CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

October 26, 2021

BOARD OF SUPERVISORS

PUBLIC HEARINGS AND REGULAR MEETING AGENDA

Creekview Community Development District

OFFICE OF THE DISTRICT MANAGER
2300 Glades Road, Suite 410W●Boca Raton, Florida 33431
Phone: (561) 571-0010●Toll-free: (877) 276-0889●Fax: (561) 571-0013

ATTENDEES:
Please identify yourself each time you speak to facilitate accurate transcription of meeting minutes.

October 19, 2021

Board of Supervisors
Creekview Community Development District

Dear Board Members:

The Board of Supervisors of the Creekview Community Development District will hold Multiple Public Hearings and a Regular Meeting on October 26, 2021, at 9:30 A.M., at the offices of Carlton Construction, Inc., 4615 U.S. Highway 17, Suite 1, Fleming Island, Florida 32003. The agenda is as follows:

1. Call to Order/Roll Call

2. Public Comments

3. Administration of Oath of Office to Elected Board of Supervisors *(the following will be provided in a separate package)*
   - A. Guide to Sunshine Amendment and Code of Ethics for Public Officers and Employees
   - B. Membership, Obligations and Responsibilities
   - C. Chapter 190, Florida Statutes
   - D. Financial Disclosure Forms
     - I. Form 1: Statement of Financial Interests
     - II. Form 1X: Amendment to Form 1, Statement of Financial Interests
     - III. Form 1F: Final Statement of Financial Interests
   - E. Form 8B: Memorandum of Voting Conflict

4. Consideration of Resolution 2022-01, Canvassing and Certifying the Results of the Landowners' Election of Supervisors Held Pursuant to Section 190.006(2), Florida Statutes, and Providing for an Effective Date

5. Consideration of Resolution 2022-02, Designating a Chair, a Vice Chair, a Secretary and Assistant Secretaries of the Creekview Community Development District, and Providing for an Effective Date

6. Public Hearing Confirming the Intent of the District to Use the Uniform Method of Levy, Collection and Enforcement of Non-Ad Valorem Assessments as Authorized and Permitted by Section 197.3632, Florida Statutes; Expressing the Need for the Levy of Non-Ad Valorem Assessments and Setting Forth the Legal Description of the Real Property Within the District's Jurisdictional Boundaries that May or Shall Be Subject to the Levy of District Non-Ad Valorem Assessments; Providing for Severability; Providing for Conflict and Providing for an Effective Date

   A. Affidavit/Proof of Publication

   B. Consideration of Resolution 2022-03, Expressing its Intent to Utilize the Uniform Method of Levying, Collecting, and Enforcing Non-Ad Valorem Assessments Which May Be Levied by Creekview Community Development District in Accordance with Section 197.3632, Florida Statutes; Providing a Severability Clause; and Providing an Effective Date

7. Public Hearing to Consider the Adoption of an Assessment Roll and the Imposition of Special Assessments Relating to the Financing and Securing of Certain Public Improvements

   - *Hear testimony from the affected property owners as to the propriety and advisability of making the improvements and funding them with special assessments on the property.*
   - *Thereafter, the governing authority shall meet as an equalizing board to hear any and all complaints as to the special assessments on a basis of justice and right.*

   A. Affidavit/Proof of Publication

   B. Mailed Notice to Property Owner(s)

   C. Capital Improvement Plan *(for informational purposes)*

   D. Master Special Assessment Methodology Report *(for informational purposes)*

   E. Consideration of Resolution 2022-04, Authorizing an Improvement Plan for the Master Assessment Area; Adopting a Capital Improvement Plan; Providing an Estimated Cost of Improvements; Adopting an Assessment Report; Equalizing, Approving, Confirming and Levying Debt Assessments on the Master Assessment Area; Addressing the Finalization of Special Assessments; Addressing the Payment of Debt Assessments and the Method of Collection; Providing for the Allocation of Debt Assessments and True-Up Payments; Addressing Government Property and Transfers of Property to Units of Local, State and Federal Government; Authorizing an Assessment Notice; and Providing for Severability, Conflicts and an Effective Date

8. Public Hearing on Adoption of Fiscal Year 2020/2021 Budget
    A. Affidavit of Publication
    B. Consideration of Resolution 2022-05, Relating to the Annual Appropriations and Adopting the Budget for the Remainder of the Fiscal Year Beginning October 1, 2020 and Ending September 30, 2021; Authorizing Budget Amendments; and Providing an Effective Date

9. Public Hearing on Adoption of Fiscal Year 2021/2022 Budget
    A. Affidavit of Publication
    B. Consideration of Resolution 2022-06, Relating to the Annual Appropriations and Adopting the Budget for the Fiscal Year Beginning October 1, 2021, and Ending September 30, 2022; Authorizing Budget Amendments; and Providing an Effective Date

10. Consideration of Resolution 2022-07, Authorizing an Individual Designated by the Board of Supervisors to Act as the District's Purchasing Agent for the Purpose of Procuring, Accepting, and Maintaining Any and All Construction Materials Necessary for the Construction, Installation, Maintenance or Completion of the District's Infrastructure Improvements as Provided in the District's Adopted Improvement Plan; Providing for the Approval of a Work Authorization; Providing for Procedural Requirements for the Purchase of Materials; Approving the Form of a Purchase Requisition Request; Approving the Form of a Purchase Order; Approving the Form of a Certificate of Entitlement; Authorizing the Purchase of Insurance; Providing a Severability Clause; and Providing an Effective Date

11. Public Hearing to Hear Public Comments and Objections to the Adoption of the Rules of Procedure, Pursuant to Sections 120.54 and 190.035, Florida Statutes
    A. Affidavits of Publication
    B. Consideration of Resolution 2022-08, Adopting Rules of Procedure; Providing a Severability Clause; and Providing an Effective Date

12. Consideration of Response to Request for Qualifications (RFQ) for Engineering Services
    A. Affidavit of Publication
    B. RFQ Package
    C. Respondents
        I. England-Thims & Miller, Inc.
        II. JBrown Professional Group, Inc.

D. Competitive Selection Criteria/ Ranking

E. Award of Contract

13. Consideration of Responses to Request for Proposals (RFP) for Annual Audit Services

A. Affidavit of Publication

B. RFP Package

C. Respondents

I. Berger, Toombs, Elam, Gaines & Frank

II. Carr, Riggs & Ingram, LLC

D. Auditor Evaluation Matrix/Ranking

E. Award of Contract

14. Consideration of Resolution 2022-09, Designating the Primary Administrative Office and Principal Headquarters of The District and Providing an Effective Date

15. Acceptance of Unaudited Financial Statements as of September 30, 2021

16. Approval of Minutes

A. August 27, 2021 Organizational Meeting

B. September 28, 2021 Landowners' Meeting

17. Staff Reports

A. District Counsel: *KE Law Group, PLLC*

- Update: Stormwater Reporting Requirements

B. District Engineer (Interim): *England-Thims & Miller, Inc.*

C. District Manager: *Wrathell, Hunt and Associates, LLC*

- NEXT MEETING DATE: November 30, 2021 at 9:30 A.M.
  - QUORUM CHECK

SEAT 1	Allen Skinner	☐ **IN PERSON**	☐ **PHONE**	☐ **NO**
SEAT 2	Richard Skinner	☐ **IN PERSON**	☐ **PHONE**	☐ **NO**
SEAT 3	Blake Weatherly	☐ **IN PERSON**	☐ **PHONE**	☐ **NO**
SEAT 4	Gregg Kern	☐ **IN PERSON**	☐ **PHONE**	☐ **NO**
SEAT 5	Liam O'Reilly	☐ **IN PERSON**	☐ **PHONE**	☐ **NO**

If you should have any questions or concerns, please do not hesitate to contact me directly at (561) 719-8675 or Kristen Suit at (410) 207-1802.

Sincerely,

Craig Wrathell
District Manager

FOR BOARD MEMBERS AND STAFF TO ATTEND BY TELEPHONE
CALL-IN NUMBER: 1-888-354-0094
PARTICIPANT PASSCODE: 413 553 5047

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

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RESOLUTION 2022-01

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT CANVASSING AND CERTIFYING THE RESULTS OF THE LANDOWNERS' ELECTION OF SUPERVISORS HELD PURSUANT TO SECTION 190.006(2), *FLORIDA STATUTES*, AND PROVIDING FOR AN EFFECTIVE DATE.

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

WHEREAS, pursuant to Section 190.006(2), *Florida Statutes*, a landowner's meeting is required to be held within 90 days of the District's creation and every two (2) years following the creation of the District for the purpose of electing supervisors of the District; and

WHEREAS, such landowner's meeting was held at which the below recited persons were duly elected by virtue of the votes cast in their favor; and

WHEREAS, the Board of Supervisors of the District, by means of this Resolution, desires to canvass the votes and declare and certify the results of said election.

NOW THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT:

1. **ELECTION RESULTS.** The following persons are found, certified, and declared to have been duly elected as Supervisors of and for the District, having been elected by the votes cast in their favor as shown:

Allen Skinner	Seat 1	600 Votes
Richard Skinner	Seat 2	500 Votes
Blake Weatherly	Seat 3	500 Votes
Gregg Kern	Seat 4	500 Votes
Liam O'Reilly	Seat 5	600 Votes

2. **TERMS.** In accordance with Section 190.006(2), *Florida Statutes,* and by virtue of the number of votes cast for the Supervisors, the above-named persons are declared to have been elected for the following term of office:

Seat 1	Allen Skinner	4-year term
Seat 2	Richard Skinner	2-year term
Seat 3	Blake Weatherly	2-year term
Seat 4	Gregg Kern	2-year term
Seat 5	Liam O'Reilly	4-year term

3. **EFFECTIVE DATE.** This resolution shall become effective immediately upon its adoption.

PASSED AND ADOPTED this 26th Day of October, 2021.

ATTEST**:**	**CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT**
_____	_____
Secretary/Assistant Secretary	Chair/Vice Chair, Board of Supervisors

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

5

RESOLUTION 2022-02

A RESOLUTION DESIGNATING A CHAIR, A VICE CHAIR, A SECRETARY, AND ASSISTANT SECRETARIES OF THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT, AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the Creekview Community Development District ("District") is a local unit of special-purpose government created and existing pursuant to Chapter 190, *Florida Statutes*, being situated in the Clay County, Florida; and

WHEREAS, the Board of Supervisors of the District desires to appoint the below-recited persons to the offices specified.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT:

1. _____ is appointed Chair.

2. _____ is appointed Vice Chair.

3. Craig Wrathell is appointed Secretary.

4. _____ is appointed Assistant Secretary.

5. _____ is appointed Assistant Secretary.

6. _____ is appointed Assistant Secretary.

7. Cindy Cerbone is appointed Assistant Secretary.

8. Kristen Suit is appointed Assistant Secretary.

9. This Resolution shall become effective immediately upon its adoption.

PASSED AND ADOPTED this 26th day of October, 2021.

ATTEST:

_____
Secretary/Assistant Secretary

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

_____
Chair/Vice Chair, Board of Supervisors

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

6A

PUBLISHER AFFIDAVIT
CLAY TODAY
Published Weekly
Orange Park, Florida

STATE OF FLORIDA
COUNTY OF CLAY:

Before the undersigned authority personally appeared Jon Cantrell, who on oath says that he is the publisher of the "Clay Today" a newspaper published weekly at Orange Park in Clay County, Florida; that the attached copy of advertisement being a

NOTICE OF THE DISTRICT'S INTENT

in the matter of

SPECIAL ASSESSMENTS

LEGAL: 48429 ORDER: 329077

was published in said newspaper in the issues:

09/30/2021
10/07/2021
10/14/2021
10/21/2021

Affiant further says that said "Clay Today" is a newspaper published at Orange Park, in said Clay County, Florida, and that the said newspaper has heretofore been continuously published in said Clay County, Florida, weekly, and has been entered as Periodical material matter at the post office in Orange Park, in said Clay County, Florida, for period of one year next proceeding the first publication of the attached copy of advertisement; and affiant further says that he has neither paid nor promised any person, firm or corporation any discount, rebate, commission or refund for the purpose of securing this advertisement for publication in the said newspaper.

Sworn to me and subscribed before me 10/21/2021.

NOTARY PUBLIC, STATE OF FLORIDA

NOTARY PUBLIC STATE OF FLORIDA
CHRISTIE LOU WAYNE
MY COMMISSION # HH34426
EXPIRES: September 20, 2024

3515 US HWY 17 Suite A, Fleming Island FL 32003
Telephone (904) 264-3200 - FAX (904) 264-3285
E-Mail: Christie@opcfla.com

NOTICE OF THE DISTRICT'S INTENT
TO USE THE UNIFORM METHOD OF COLLECTION OF NON-AD VALOREM SPECIAL ASSESSMENTS
CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

Notice is hereby given that the Creekview Community Development District (**"District"**) intends to use the uniform method of collecting non-ad valorem special assessments to be levied by the District pursuant to Section 197.3632, Florida Statutes. The Board of Supervisors of the District will conduct a public hearing on **October 26, 2021, at 9:30 a.m. at the offices of Carlton Construction, Inc., 4615 U.S. Highway 17, Suite 1, Fleming Island, Florida 32003.**

The purpose of the public hearing is to consider the adoption of a resolution authorizing the District to use the uniform method of collecting non-ad valorem special assessments (**"Uniform Method"**) to be levied by the District on properties located on land included in, or to be added to, the District.

The District may levy non-ad valorem special assessments for the purpose of financing, acquiring, maintaining and/or operating community development facilities, services and improvements within and without the boundaries of the District, to consist of, among other things, recreational facilities, stormwater management improvements, irrigation, landscape, roadways, and other lawful improvements or services within or without the boundaries of the District.

Owners of the properties to be assessed and other interested parties may appear at the public hearing and be heard regarding the use of the Uniform Method. This hearing is open to the public and will be conducted in accordance with the provisions of Florida law. The public hearing may be continued to a date, time, and location to be specified on the record at the hearing.

There may be occasions when Supervisors or District Staff may participate by speaker telephone. Pursuant to provisions of the Americans with Disabilities Act, any person requiring special accommodations at this meeting because of a disability or physical impairment should contact the District Office, c/o Wrathell, Hunt & Associates, LLC, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431, or by calling (877) 276-0889, at least forty-eight (48) hours prior to the meeting. If you are hearing or speech impaired, please contact the Florida Relay Service by dialing 7-1-1, or 1-800-955-8771 (TTY) / 1-800-955-8770 (Voice), for aid in contacting the District Office.

A person who decides to appeal any decision made at the hearing with respect to any matter considered at the hearing is advised that person will need a record of the proceedings and that accordingly, the person may need to ensure that a verbatim record of the proceedings is made, including the testimony and evidence upon which such appeal is to be based.

Craig Wrathell
District Manager

Legal 48429 published Sept 30, Oct 7, Oct 14, and Oct 21 2021 in Clay County's Clay Today newspaper

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

6B

RESOLUTION 2022-03

RESOLUTION OF THE BOARD OF SUPERVISORS OF CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT EXPRESSING ITS INTENT TO UTILIZE THE UNIFORM METHOD OF LEVYING, COLLECTING, AND ENFORCING NON-AD VALOREM ASSESSMENTS WHICH MAY BE LEVIED BY CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT IN ACCORDANCE WITH SECTION 197.3632, FLORIDA STATUTES; PROVIDING A SEVERABILITY CLAUSE; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, Creekview Community Development District ("District") was established pursuant to the provisions of Chapter 190, *Florida Statutes*, which authorizes the District to levy certain assessments which include benefit and maintenance assessments and further authorizes the District to levy special assessments pursuant to Chapters 170 and 197, *Florida Statutes*, for the acquisition, maintenance, construction, or reconstruction of assessable improvements authorized by Chapter 190, *Florida Statutes*; and

WHEREAS, the above referenced assessments are non-ad valorem in nature and, therefore, may be levied and collected under the provisions of Section 197.3632, *Florida Statutes*, in which the State of Florida has provided a uniform method for the levying, collecting, and enforcing such non-ad valorem assessments ("Uniform Method"); and

WHEREAS, the Board has previously adopted Resolution 2021-29 declaring the intent to use the Uniform Method for the levy, collection and enforcement of non-ad valorem special assessments authorized by Section 197.3632, *Florida Statutes*, over certain lands within the District as described therein; and

WHEREAS, pursuant to Section 197.3632, *Florida Statutes*, the District has caused notice of a public hearing on the District's intent to use the Uniform Method to be advertised weekly in a newspaper of general circulation within Clay County for four (4) consecutive weeks prior to such hearing; and

WHEREAS, the District has held a public hearing pursuant to Section 197.3632, *Florida Statutes*, where public and landowners were allowed to give testimony regarding the use of the Uniform Method; and

WHEREAS, the District desires to use the Uniform Method for the levy, collection and enforcement of non-ad valorem special assessments authorized by Section 197.3632, *Florida Statutes*, for special assessments, including benefit and maintenance assessments, over all the lands in the District as further described in **Exhibit A**.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT:

SECTION 1. The Creekview Community Development District, upon conducting its public hearing as required by Section 197.3632, *Florida Statutes*, hereby expresses its need and intent to use the Uniform Method of collecting assessments imposed by the District over the lands described in **Exhibit A**, as provided in Chapters 170 and 190, *Florida Statutes*, each of which are non-ad valorem assessments which may be collected annually pursuant to the provisions of Chapter 190, *Florida Statutes*, for the purpose of paying principal and interest on any and all of its indebtedness and for the purpose of paying the cost of operating and maintaining its assessable improvements. The legal description of the boundaries of the real property subject to a levy of assessments is attached and made a part of this Resolution as **Exhibit A**. The non-ad valorem assessments and the District's use of the uniform method of collecting its non-ad valorem assessment(s) may continue in any given year when the Board of Supervisors determines that use of the uniform method for that year is in the best interests of the District.

SECTION 2. The District's Secretary is authorized to provide the Property Appraiser and Tax Collector of Clay County and the Department of Revenue of the State of Florida with a copy of this Resolution and enter into any agreements with the Property Appraiser and/or Tax Collector necessary to carry out the provisions of this Resolution.

SECTION 3. If any provision of this Resolution is held to be illegal or invalid, the other provisions shall remain in full force and effect.

SECTION 4. This Resolution shall become effective upon its passage and shall remain in effect unless rescinded or repealed.

PASSED AND ADOPTED this 26th day of October, 2021.

ATTEST:

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

_____
Secretary / Assistant Secretary

_____
Chair/Vice Chair, Board of Supervisors

Exhibit A: Legal Description of the Property

Exhibit A

Legal Description of the Property

SURVEYOR'S DESCRIPTION

PARCEL A:
A portion of Sections 14, 15, 16 and 22, Township 5 South, Range 25 East, Clay County, Florida, being all of Parcels 1 and 2, as described and recorded in Official Records Book 4147, page 1386, of the Public Records of said county, be more particularly described as follows:

For a Point of Beginning, commence at the Southeast corner of said Section 15; thence North 00°31'29" East, along the Easterly line of said Section 15, a distance of 1620.45 feet to an angle point in the Southerly boundary line of said Parcel 2, of Official Records Book 4147, page 1386; thence South 74°45'48" West, departing said Easterly line and along said Southerly boundary line, 1639.52 feet to a point lying on the Easterly line of Exception Parcel A, as described and recorded in Official Records Book 1598, page 1299, of said Public Records; thence South 14°51'45" East, along said Easterly line and along the Easterly line of Exception Parcel C, as described and recorded in said Official Records Book 1598, page 1299, a distance of 1934.20 feet; thence Southerly continuing along said Easterly line of Exception Parcel C the following 3 courses: Course 1, thence South 28°24'51" West, 1030.00 feet; Course 2, thence South 00°57'07" West, 1500.00 feet; Course 3, thence South 06°26'53" East, 479.78 feet to the Southeasterly corner thereof, said corner lying on the Northerly right of way line of Sandridge Road (County Road No. C-739-B) (formerly State Road No. S-739-B), a variable width right of way as presently established; thence South 89°33'55" West, along said Northerly right of way line, 2396.63 feet to the Southeasterly corner of those lands described and recorded in Official Records Book 1421, page 1951, of said Public Records; thence North 00°11'40" East, departing said Northerly right of way line and along the Easterly line of said Official Records Book 1421, page 1951, a distance of 3054.55 feet to the Northeasterly corner thereof, said corner also being the Southeasterly corner of those lands described and recorded in Official Records Book 2061, page 1775, of said Public Records; thence North 01°21'22" West, along the Easterly line of said Official Records Book 2061, page 1775, a distance of 489.70 feet to the Northeasterly corner thereof, said corner also being the Southeasterly corner of Parcel 1, as described and recorded in Official Records Book 1486, page 381, of said Public Records; thence North 00°12'59" West, along the Easterly line of last said Parcel 1 and along the Easterly line of those lands described and recorded in Official Records Book 1711, page 652, of said Public Records, 694.47 feet to a point lying on said Southerly boundary line of Parcel 2, of Official Records Book 4147, page 1386; thence South 89°25'48" West, along said Southerly boundary line of Parcel 2, a distance of 1270.46 feet to a point lying on the Easterly line of Parcel "A" as described and recorded in Official Records Book 4173, page 490, of said Public Records; thence North 00°12'59" West, along said Easterly line, 448.60 feet to the Northeasterly corner thereof; thence South 88°56'50" West, along the Northerly line of said Parcel "A", and along the Northerly lines of those lands described and recorded in Official Records Book 4173, page 493 (Parcel "B"), and Official Records Book 4178, page 1821, all of said Public Records, a distance of 3902.38 feet to its intersection with the Easterly right of way line of Henley Road (County Road No. C-739) (formerly State Road No. S-739), a variable width right of way as presently established; thence Northerly along said Easterly right of way line the following 3 courses: Course 1, thence North 00°37'24" West, departing last said Northerly line, 69.82 feet; Course 2, thence North 00°18'49" West, 266.40 feet; Course 3, thence North 00°23'32" West, 776.21 feet to the Southwesterly corner of those lands described and recorded in Official Records Book 4167, page 1057, of said Public Records; thence North 88°55'54" East, departing said Easterly right of way line, along the Southerly line of said Official Records Book 4167, page 1057, and along the Southerly line of those lands described and recorded in Official Records Book 2673, page 522, of said Public Records, a distance of 3905.73 feet to the Southeasterly corner thereof, said corner also being the Southwesterly corner of those lands described and recorded in Official Records Book 2374, page 885, of said Public Records; thence North 88°59'40" East, along the Southerly line of said Official Records Book 2374, page 885, a distance of 1270.05 feet to the Southeasterly corner thereof; thence North 00°11'43" West, along the Easterly line of said Official Records Book 2374, page 885, and along the Easterly lines of those lands described and recorded in Official Records Book 2374, page 892, and Official Records Book 2859, page 403, all of said Public Records, 2749.63 feet to a point lying on the boundary line of State Road No. 23, Parcel 114, Part "A", a variable width limited access right of way as described and recorded in Official Records Book 4085, page 409, of said Public Records; thence Southeasterly along said boundary line of State Road No. 23 the following 3 courses: Course 1, thence South 89°59'29" East, departing said Easterly line of Official Records Book 2859, page 403, a distance of 1657.84 feet to the point of curvature of a curve concave Southwesterly having a radius of 2512.00 feet; Course 2, thence Southeasterly along the arc of said curve, through a central angle of 92°30'23", an arc length of 4055.73 feet to the point of tangency of said curve, said arc being subtended by a chord bearing and distance of South 43°44'17" East, 3629.35 feet; Course 3, thence South 02°30'54" West, 2354.94 feet to the Westerly corner of the Southerly terminus of said Parcel 114, Part "A", said corner lying on the Southerly line of said Section 14; thence South 89°17'09" West, along said Southerly line, 104.52 feet to the Point of Beginning.

Containing 745.05 acres, more or less.

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

7A

PUBLISHER AFFIDAVIT

CLAY TODAY
Published Weekly
Orange Park, Florida

STATE OF FLORIDA
COUNTY OF CLAY:

Before the undersigned authority personally appeared Jon Cantrell, who on oath says that he is the publisher of the "Clay Today" a newspaper published weekly at Orange Park in Clay County, Florida; that the attached copy of advertisement Being

NOTICE OF PUBLIC HEARING

in the matter of

ADOPTION OF ASSESSMENT ROLL

LEGAL 48474 Order 280691

See attached

was published in said newspaper in the issues

SEPTEMBER 30 AND OCTOBER 7, 2021

Affiant further says that said "Clay Today" is a newspaper published at Orange Park, in said Clay County, Florida, and that the said newspaper has heretofore been continuously published in said Clay County, Florida, weekly, and has been entered as Periodical material matter at the post office in Orange Park, in said Clay County, Florida, for period of one year next proceeding the first publication of the attached copy of advertisement; and affiant further says that he has neither paid nor promised any person, firm or corporation any discount, rebate, commission or refund for the purpose of securing this advertisement for publication in the said newspaper.

Sworn to me and subscribed
before me this 7TH day of OCTOBER, 2021

Christie Lou Wayne
NOTARY PUBLIC, STATE OF FLORIDA

NOTARY PUBLIC STATE OF FLORIDA
CHRISTIE LOU WAYNE
MY COMMISSION # HH34426
EXPIRES: September 20, 2024

3513 US HWY 17 Suite A, Fleming Island FL 32003
Telephone (904) 264-3200 - FAX (904) 264-3285

NOTICE OF PUBLIC HEARING TO CONSIDER IMPOSITION OF SPECIAL ASSESSMENTS PURSUANT TO SECTION 170.07, FLORIDA STATUTES, BY THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

NOTICE OF PUBLIC HEARING TO CONSIDER ADOPTION OF ASSESSMENT ROLL PURSUANT TO SECTION 197.3632(4)(b), *FLORIDA STATUTES*, BY THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

NOTICE OF REGULAR MEETING OF THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

The Board of Supervisors (**"Board"**) of the Creekview Community Development District (**"District"**) will hold a public hearing on **October 26, 2021, at 9:30 a.m. at the offices of Carlton Construction, Inc., 4615 U.S. Highway 17, Suite 1, Fleming Island, Florida 32003**, to consider the adoption of an assessment roll, the imposition of special assessments to secure proposed bonds on benefited lands within the District, a depiction of which lands is shown below, and to provide for the levy, collection and enforcement of the special assessments. The streets and areas to be improved are geographically depicted below and in the District's *Creekview Community Development District Capital Improvement Plan* ("CIP"). The public hearing is being conducted pursuant to Chapters 170, 190 and 197, *Florida Statutes*. A description of the property to be assessed and the amount to be assessed to each piece or parcel of property may be ascertained at the office of the District Manager located at 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431 (**"District Manager's Office"**).

The District is a unit of special-purpose local government responsible for providing infrastructure improvements for lands within the District. The infrastructure improvements expected to be funded by the District ("Improvements") are described in the CIP, and are currently expected to include, but are not limited to, road rights-of-way and improvements, utilities, stormwater systems, recreational improvements and other improvements, all as more specifically described in the CIP, on file and available during normal business hours at the District Manager's Office. According to the CIP, the estimated cost of the Improvements is **$90,549,000**.

The District intends to impose assessments on benefited lands within the District in the manner set forth in the District's *Master Special Assessment Methodology Report* (**"Assessment Report"**), which is also on file and available during normal business hours at the District Manager's Office. The purpose of any such assessment is to secure the bonds issued to fund the Improvements.

As described in more detail in the Assessment Report, the District's assessments will be levied against all benefitted lands within the District. The Assessment Report identifies maximum assessment amounts for each land use category that is currently expected to be assessed. The method of allocating assessments for the Improvements to be funded by the District will initially be determined on an equal assessment per gross acre basis, and will be allocated on an equivalent residential unit (**"ERU"**) basis at the time that such property is platted or subject to a site plan. Please consult the Assessment Report for a more detailed explanation of the methodology.

The annual principal assessment levied against each parcel will be based on repayment over thirty (30) years of the total debt allocated to each parcel. The District expects to collect sufficient revenues to retire no more than **$115,325,000** in debt to be assessed by the District, exclusive of fees and costs of collection or enforcement, discounts for early payment and interest. The proposed annual schedule of assessments is as follows:

Land Use	Total # of Units / Acres	ERU Factor	Proposed Maximum Principal Per Unit	Proposed Maximum Annual Assessment Per Unit*
Townhome	102	0.60	$43,755.53	$3,455.21
Single Family 40'	32	0.80	$58,340.71	$4,606.94
Single Family 50'	698	1.00	$72,925.89	$5,758.68
Single Family 60'	353	1.20	$87,511.07	$6,910.42
Single Family 70'	94	1.40	$102,096.24	$8,062.15

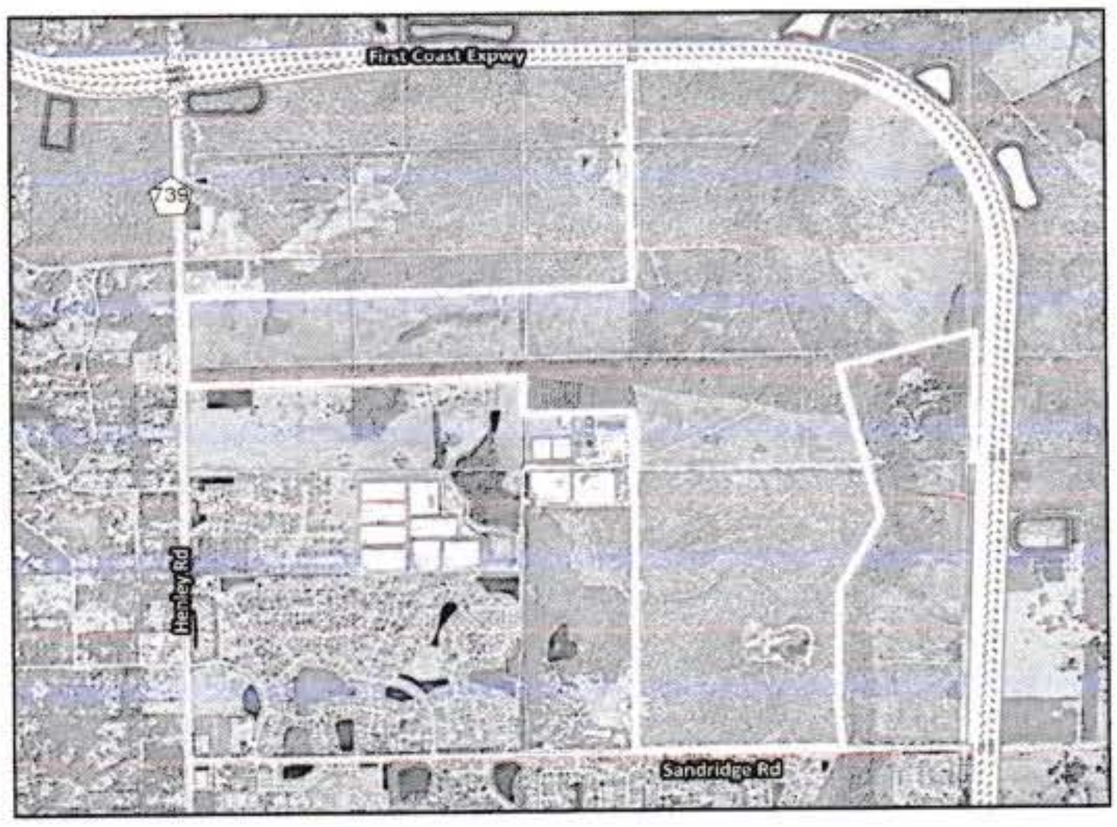
* Including costs of collection and allowance for early payment discount

All amounts stated herein are subject to change and/or final determination at the public hearings and meeting identified above. Specific maximum amounts expected per parcel or product type are as set forth in the Assessment Report.

The assessments may be prepaid in whole at any time, or in some instances in part, or may be paid in not more than thirty (30) annual installments subsequent to the issuance of debt to finance the improvements. These annual assessments are anticipated to be collected on the Clay County tax roll by the Tax Collector. Alternatively, the District may choose to directly collect and enforce these assessments. All affected property owners have the right to appear at the public hearings and the right to file written objections with the District within twenty (20) days of the publication of this notice. Notwithstanding the description of the Maximum Assessments herein, landowners will not have a payment obligation until the issuance of bonds, at which time the fixed assessment amounts securing those bonds, as well as a collection protocol, will be determined. The fixed assessment amounts will be determined at a public meeting, pursuant to a supplemental assessment resolution, engineer's report and assessment methodology, but will in no event exceed the Maximum Assessments noticed herein. Please note that the preceding statement only applies to capital (debt) assessments, and shall have no effect on the ability of the District to levy assessments and collect payments related to the operation and maintenance of the District.

At the same date, time, and place, the Board will hold a regular public meeting to consider any other business that may lawfully be considered by the District. The Board meeting and hearings are open to the public and will be conducted in accordance with the provisions of Florida law for community development districts. The Board meeting and/or the public hearings may be continued in progress to a date and time certain announced at the meeting and/or hearings.

If anyone chooses to appeal any decision of the Board with respect to any matter considered at the meeting or hearings, such person will need a record of the proceedings and should accordingly ensure that a verbatim record of the proceedings is made, which includes the testimony and evidence upon which such appeal is to be based.



Pursuant to provisions of the Americans with Disabilities Act, any person requiring special accommodations at this meeting because of a disability or physical impairment should contact the District Manager's Office, c/o Wrathell, Hunt & Associates, LLC, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431, or by calling (877) 276-0889, at least forty-eight (48) hours prior to the meeting. If you are hearing or speech impaired, please contact the Florida Relay Service by dialing 7-1-1, or 1-800-955-8771 (TTY) / 1-800-955-8770 (Voice), for aid in contacting the District Manager's Office.

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

RESOLUTION 2021-30

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT DECLARING SPECIAL ASSESSMENTS; DESIGNATING THE NATURE AND LOCATION OF THE PROPOSED IMPROVEMENTS; DECLARING THE TOTAL ESTIMATED COST OF THE IMPROVEMENTS, THE PORTION TO BE PAID BY ASSESSMENTS, AND THE MANNER AND TIMING IN WHICH THE ASSESSMENTS ARE TO BE PAID; DESIGNATING THE LANDS UPON WHICH THE ASSESSMENTS SHALL BE LEVIED; PROVIDING FOR AN ASSESSMENT PLAT AND A PRELIMINARY ASSESSMENT ROLL; ADDRESSING THE SETTING OF PUBLIC HEARINGS; PROVIDING FOR PUBLICATION OF THIS RESOLUTION; AND ADDRESSING CONFLICTS, SEVERABILITY AND AN EFFECTIVE DATE.

WHEREAS, the Creekview Community Development District (**"District"**) was established by Ordinance 2021-20 as adopted by the Board of County Commissioners of Clay County, Florida, effective June 29, 2021, and is a local unit of special-purpose government organized and existing under and pursuant to Chapter 190, Florida Statutes, as amended, located entirely within Clay County, Florida; and

WHEREAS, the District is authorized by Chapter 190, *Florida Statutes*, to finance, fund, plan, establish, acquire, install, equip, operate, extend, or construct certain improvements, including but not limited to: transportation facilities, utility facilities, recreational facilities, and other infrastructure projects, and services necessitated by the development of, and serving lands within, the District; and

WHEREAS, the Board of Supervisors (**"Board"**) of the District hereby determines to undertake, install, plan, establish, construct or reconstruct, enlarge or extend, equip, acquire, operate, and/or maintain the infrastructure improvements described in the District's *Capital Improvement Plan*, dated August 26, 2021, attached hereto as Exhibit A and incorporated herein by reference ("CIP" and the improvements described therein, the "Improvements"); and

WHEREAS, it is in the best interest of the District to pay all or a portion of the cost of the Improvements by special assessments levied on benefitted lands within the District pursuant to Chapters 170, 190 and 197, Florida Statutes (**"Assessments"**); and

WHEREAS, the District is empowered by Chapters 170, 190, and 197, Florida Statutes, to finance, fund, plan, establish, acquire, construct or reconstruct, enlarge or extend, equip, operate, and maintain the Improvements and to impose, levy and collect the Assessments; and

WHEREAS, this Resolution shall serve as the "resolution required to declare special assessments" contemplated by Section 170.03, Florida Statutes, for the assessment lien(s) levied against the property as described in **Exhibits A** and **B** that secure the Assessments.

WHEREAS, as set forth in the Master Special Assessment Methodology Report, dated August 27, 2021, attached hereto as **Exhibit** B and incorporated herein by reference (**"Assessment Report"**), and on file at Wrathell, Hunt and Associates, LLC, 2300 Glades Road, suite 410W, Boca Raton, Florida 33431 (**"District Records Office"**), the District hereby finds and determines that:

(i) benefits from the improvements will accrue to the property improved,
(ii) the amount of those benefits will exceed the amount of the Assessments, and
(iii) the Assessments are fairly and reasonably allocated.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT:

1. **AUTHORITY FOR THIS RESOLUTION; INCORPORATION OF RECITALS.** This Resolution is adopted pursuant to the provisions of Florida law, including without limitation Chapters 170, 190, and 197, Florida Statutes. The recitals stated above are incorporated herein and are adopted by the Board as true and correct statements.

2. **DECLARATION OF ASSESSMENTS.** The Board hereby declares that it has determined to undertake all or a portion of the improvements and to defray all or a portion of the cost thereof by the Assessments and is as set forth in the Assessment Report attached as **Exhibit B**.

3. **DESIGNATING THE NATURE AND LOCATION OF IMPROVEMENTS.** The nature and general location of, and plans and specifications for, the Improvements are described in Exhibit A and as set forth in the CIP, which is on file at the District Records Office. Exhibit B is also on file and available for public inspection at the same location.

4. **DECLARING THE TOTAL ESTIMATED COST OF THE IMPROVEMENTS, THE PORTION TO BE PAID BY ASSESSMENTS, AND THE MANNER AND TIMING IN WHICH THE ASSESSMENTS ARE TO BE PAID.**

A. The total estimated construction cost of the Improvements is **$90,549,000** (**"Estimated Cost"**).

B. The Assessments will defray approximately $115,325,000 which is the anticipated maximum par value of any bonds and which includes all or a portion of the Estimated Cost, as well as other financing-related costs, capitalized interest, and a debt service reserve as set forth in **Exhibit B**.

C. The manner in which the Assessments shall be apportioned and paid is set forth in the Assessment Report attached as **Exhibit B**, as may be modified by supplemental assessment resolutions. Commencing with the years in which the Assessments are certified for collection, the Assessments shall each be paid in not more than thirty (30) annual installments. The Assessments may be payable at the same time and in the same manner as are ad valorem taxes and collected pursuant to Chapter 197, *Florida Statutes*; provided, however, that in the event the uniform non-ad valorem assessment method of collecting the Assessments is not available to the District in any year, or if determined by the District to be in its best interest, the Assessments may be collected as is otherwise permitted by law, including but not limited to by direct bill. The decision to collect Assessments by any particular method – e.g., on the tax roll or by direct bill – does not mean that such method will be used to collect Assessments in future years, and the District reserves the right in its sole discretion to select collection methods in any given year, regardless of past practices.

5. **DESIGNATING THE LANDS UPON WHICH THE ASSESSMENTS SHALL BE LEVIED.** The Assessments shall be levied, within the District, on all lots and lands adjoining and contiguous or bounding and abutting upon such Improvements or specially benefitted thereby and further designated by the assessment plat hereinafter provided for.

6. **ASSESSMENT PLAT.** Pursuant to Section 170.04, *Florida Statutes*, there is on file, at the District Records Office, an assessment plat showing the area to be assessed, with certain plans and specifications describing the Improvements and the estimated cost of the Improvements, all of which are open to inspection by the public.

7. **PRELIMINARY ASSESSMENT ROLL.** Pursuant to Section 170.06, *Florida Statutes*, the District Manager has caused to be made a preliminary assessment roll, in accordance with the method of assessment described in Exhibit B hereto, which shows the lots and lands assessed, the amount of benefit to and the maximum assessment against each lot or parcel of land and the number of annual installments into which the assessment may be divided, which assessment roll is hereby adopted and approved as the District's preliminary assessment roll.

8. **PUBLIC HEARINGS DECLARED; DIRECTION TO PROVIDE NOTICE OF THE HEARINGS.** Pursuant to Sections 170.07 and 197.3632(4)(b), Florida Statutes, among other provisions of Florida law, there are hereby declared two (2) public hearings to be held as follows:

NOTICE OF PUBLIC HEARINGS

DATE: October 26, 2021
TIME: 9:30 a.m.
LOCATION: offices of Carlton Construction, Inc.
4615 U.S. Highway 17, Suite 1
Fleming Island, Florida 32003

The purpose of the public hearings is to hear comment and objections to the proposed special assessment program for District Improvements as identified in the CIP and the preliminary assessment roll, a copy of which is on file at the District Records Office. Interested parties may appear at that hearing or submit their comments in writing prior to the hearings at the District Records Office.

Notice of said hearings shall be advertised in accordance with Chapters 170 and 197, *Florida Statutes*, and the District Manager is hereby authorized and directed to place said notice in a newspaper of general circulation within Clay County (by two (2) publications one (1) week apart with the first publication at least twenty (20) days prior to the date of the hearing established herein). The District Manager shall file a publisher's affidavit with the District Secretary verifying such publication of notice. The District Manager is further authorized and directed to give thirty (30) days written notice by mail of the time and place of the hearing to the owners of all property to be assessed and include in such notice the amount of the assessment for each such property owner, a description of the areas to be improved and notice that information concerning all assessments may be ascertained at the District Records Office. The District Manager shall file proof of such mailing by affidavit with the District Secretary.

9. **PUBLICATION OF RESOLUTION.** Pursuant to Section 170.05, *Florida Statutes*, the District Manager is hereby directed to cause this Resolution to be published twice (once a week for two (2) weeks) in a newspaper of general circulation within Clay County and to provide such other notice as may be required by law or desired in the best interests of the District.

10. **CONFLICTS.** All resolutions or parts thereof in conflict herewith are, to the extent of such conflict, superseded and repealed.

11. **SEVERABILITY.** If any section or part of a section of this Resolution is declared invalid or unconstitutional, the validity, force, and effect of any other section or part of a section of this Resolution shall not thereby be affected or impaired unless it clearly appears that such other section or part of a section of this Resolution is wholly or necessarily dependent upon the section or part of a section so held to be invalid or unconstitutional.

12. **EFFECTIVE DATE.** This Resolution shall become effective upon its adoption.

PASSED AND ADOPTED this 27th day of August, 2021.

Attest: **CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT**

/S/Kristen Suit
Secretary/Assistant Secretary

/S/ Liam O'Reilly
Chair/Vice Chair, Board of Supervisors

Exhibit A: ***Capital Improvement Plan, dated August 26, 2021***
Exhibit B: ***Master Special Assessment Methodology Report, dated August 27, 2021***

Legal 48474 published Sept 30 and Oct 7, 2021 in Clay County's Clay Today newspaper

NOTICE OF PUBLIC HEARING TO CONSIDER IMPOSITION OF SPECIAL ASSESSMENTS PURSUANT TO SECTION 170.07, FLORIDA STATUTES, BY THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

NOTICE OF PUBLIC HEARING TO CONSIDER ADOPTION OF ASSESSMENT ROLL PURSUANT TO SECTION 197.3632(4)(b), *FLORIDA STATUTES*, BY THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

NOTICE OF REGULAR MEETING OF THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

The Board of Supervisors (**"Board"**) of the Creekview Community Development District (**"District"**) will hold a public hearing on **October 26, 2021, at 9:30 a.m. at the offices of Carlton Construction, Inc., 4615 U.S. Highway 17, Suite 1, Fleming Island, Florida 32003**, to consider the adoption of an assessment roll, the imposition of special assessments to secure proposed bonds on benefited lands within the District, a depiction of which lands is shown below, and to provide for the levy, collection and enforcement of the special assessments. The streets and areas to be improved are geographically depicted below and in the District's *Creekview Community Development District Capital Improvement Plan* ("CIP"). The public hearing is being conducted pursuant to Chapters 170, 190 and 197, *Florida Statutes*. A description of the property to be assessed and the amount to be assessed to each piece or parcel of property may be ascertained at the office of the District Manager located at 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431 (**"District Manager's Office"**).

The District is a unit of special-purpose local government responsible for providing infrastructure improvements for lands within the District. The infrastructure improvements expected to be funded by the District ("Improvements") are described in the CIP, and are currently expected to include, but are not limited to, road rights-of-way and improvements, utilities, stormwater systems, recreational improvements and other improvements, all as more specifically described in the CIP, on file and available during normal business hours at the District Manager's Office. According to the CIP, the estimated cost of the Improvements is **$90,549,000**.

The District intends to impose assessments on benefited lands within the District in the manner set forth in the District's *Master Special Assessment Methodology Report* (**"Assessment Report"**), which is also on file and available during normal business hours at the District Manager's Office. The purpose of any such assessment is to secure the bonds issued to fund the Improvements.

As described in more detail in the Assessment Report, the District's assessments will be levied against all benefitted lands within the District. The Assessment Report identifies maximum assessment amounts for each land use category that is currently expected to be assessed. The method of allocating assessments for the Improvements to be funded by the District will initially be determined on an equal assessment per gross acre basis, and will be allocated on an equivalent residential unit (**"ERU"**) basis at the time that such property is platted or subject to a site plan. Please consult the Assessment Report for a more detailed explanation of the methodology.

The annual principal assessment levied against each parcel will be based on repayment over thirty (30) years of the total debt allocated to each parcel. The District expects to collect sufficient revenues to retire no more than **$115,325,000** in debt to be assessed by the District, exclusive of fees and costs of collection or enforcement, discounts for early payment and interest. The proposed annual schedule of assessments is as follows:

Land Use	Total # of Units / Acres	ERU Factor	Proposed Maximum Principal Per Unit	Proposed Maximum Annual Assessment Per Unit*
Townhome	102	0.60	$43,755.53	$3,455.21
Single Family 40'	32	0.80	$58,340.71	$4,606.94
Single Family 50'	698	1.00	$72,925.89	$5,758.68
Single Family 60'	553	1.20	$87,511.07	$6,910.42
Single Family 70'	95	1.40	$102,096.24	$8,062.15

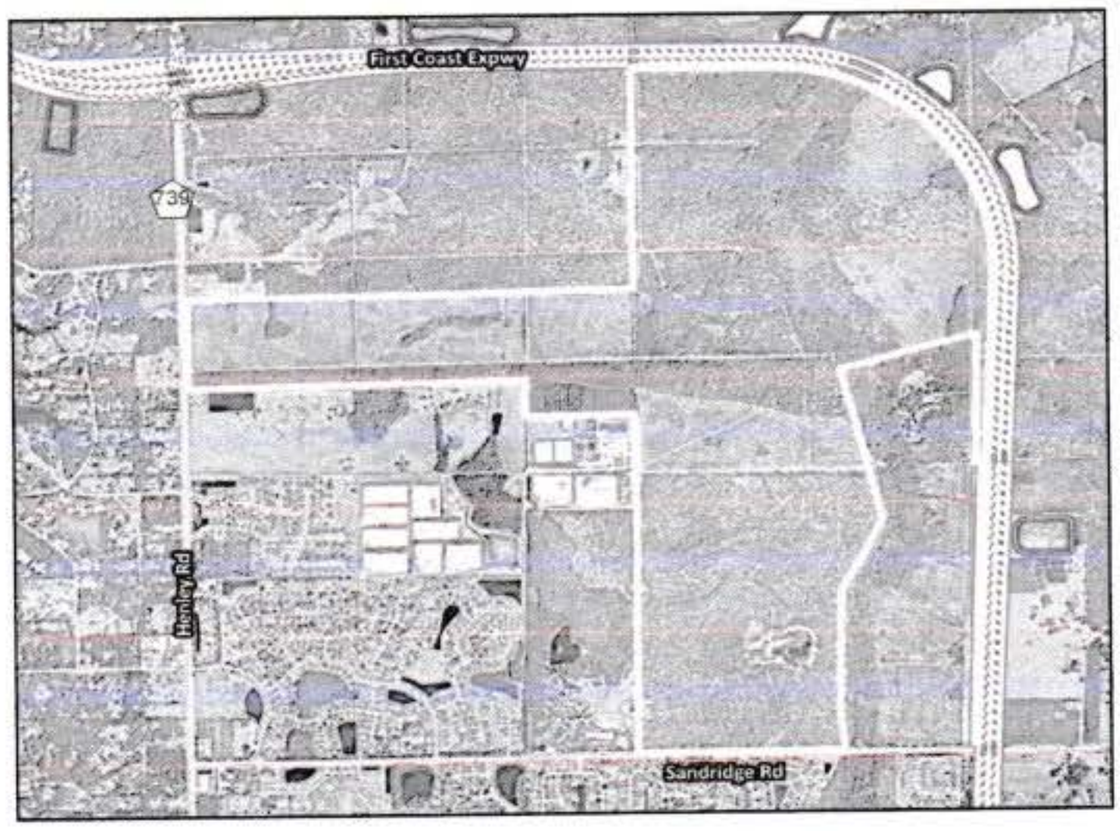
* Including costs of collection and allowance for early payment discount

All amounts stated herein are subject to change and/or final determination at the public hearings and meeting identified above. Specific maximum amounts expected per parcel or product type are as set forth in the Assessment Report.

The assessments may be prepaid in whole at any time, or in some instances in part, or may be paid in not more than thirty (30) annual installments subsequent to the issuance of debt to finance the improvements. These annual assessments are anticipated to be collected on the Clay County tax roll by the Tax Collector. Alternatively, the District may choose to directly collect and enforce these assessments. All affected property owners have the right to appear at the public hearings and the right to file written objections with the District within twenty (20) days of the publication of this notice. Notwithstanding the description of the Maximum Assessments herein, landowners will not have a payment obligation until the issuance of bonds, at which time the fixed assessment amounts securing those bonds, as well as a collection protocol, will be determined. The fixed assessment amounts will be determined at a public meeting, pursuant to a supplemental assessment resolution, engineer's report and assessment methodology, but will in no event exceed the Maximum Assessments noticed herein. Please note that the preceding statement only applies to capital (debt) assessments, and shall have no effect on the ability of the District to levy assessments and collect payments related to the operation and maintenance of the District.

At the same date, time, and place, the Board will hold a regular public meeting to consider any other business that may lawfully be considered by the District. The Board meeting and hearings are open to the public and will be conducted in accordance with the provisions of Florida law for community development districts. The Board meeting and/or the public hearings may be continued in progress to a date and time certain announced at the meeting and/or hearings.

If anyone chooses to appeal any decision of the Board with respect to any matter considered at the meeting or hearings, such person will need a record of the proceedings and should accordingly ensure that a verbatim record of the proceedings is made, which includes the testimony and evidence upon which such appeal is to be based.



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CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

RESOLUTION 2021-30

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT DECLARING SPECIAL ASSESSMENTS; DESIGNATING THE NATURE AND LOCATION OF THE PROPOSED IMPROVEMENTS; DECLARING THE TOTAL ESTIMATED COST OF THE IMPROVEMENTS, THE PORTION TO BE PAID BY ASSESSMENTS, AND THE MANNER AND TIMING IN WHICH THE ASSESSMENTS ARE TO BE PAID; DESIGNATING THE LANDS UPON WHICH THE ASSESSMENTS SHALL BE LEVIED; PROVIDING FOR AN ASSESSMENT PLAT AND A PRELIMINARY ASSESSMENT ROLL; ADDRESSING THE SETTING OF PUBLIC HEARINGS; PROVIDING FOR PUBLICATION OF THIS RESOLUTION; AND ADDRESSING CONFLICTS, SEVERABILITY AND AN EFFECTIVE DATE.

WHEREAS, the Creekview Community Development District (**"District"**) was established by Ordinance 2021-20 as adopted by the Board of County Commissioners of Clay County, Florida, effective June 29, 2021, and is a local unit of special-purpose government organized and existing under and pursuant to Chapter 190, Florida Statutes, as amended, located entirely within Clay County, Florida; and

WHEREAS, the District is authorized by Chapter 190, *Florida Statutes*, to finance, fund, plan, establish, acquire, install, equip, operate, extend, or construct certain improvements, including but not limited to: transportation facilities, utility facilities, recreational facilities, and other infrastructure projects, and services necessitated by the development of, and serving lands within, the District; and

WHEREAS, the Board of Supervisors (**"Board"**) of the District hereby determines to undertake, install, plan, establish, construct or reconstruct, enlarge or extend, equip, acquire, operate, and/or maintain the infrastructure improvements described in the District's *Capital Improvement Plan*, dated August 26, 2021, attached hereto as Exhibit A and incorporated herein by reference ("CIP" and the improvements described therein, the "Improvements"); and

WHEREAS, it is in the best interest of the District to pay all or a portion of the cost of the Improvements by special assessments levied on benefitted lands within the District pursuant to Chapters 170, 190 and 197, Florida Statutes (**"Assessments"**); and

WHEREAS, the District is empowered by Chapters 170, 190, and 197, Florida Statutes, to finance, fund, plan, establish, acquire, construct or reconstruct, enlarge or extend, equip, operate, and maintain the Improvements and to impose, levy and collect the Assessments; and

WHEREAS, this Resolution shall serve as the "resolution required to declare special assessments" contemplated by Section 170.03, Florida Statutes, for the assessment lien(s) levied against the property as described in **Exhibits A** and **B** that secure the Assessments.

WHEREAS, as set forth in the Master Special Assessment Methodology Report, dated August 27, 2021, attached hereto as **Exhibit** B and incorporated herein by reference (**"Assessment Report"**), and on file at Wrathell, Hunt and Associates, LLC, 2300 Glades Road, suite 410W, Boca Raton, Florida 33431 (**"District Records Office"**), the District hereby finds and determines that

(i) benefits from the Improvements will accrue to the property improved,
(ii) the amount of those benefits will exceed the amount of the Assessments, and
(iii) the Assessments are fairly and reasonably allocated.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT:

1. **AUTHORITY FOR THIS RESOLUTION; INCORPORATION OF RECITALS.** This Resolution is adopted pursuant to the provisions of Florida law, including without limitation Chapters 170, 190, and 197, Florida Statutes. The recitals stated above are incorporated herein and are adopted by the Board as true and correct statements.

2. **DECLARATION OF ASSESSMENTS.** The Board hereby declares that it has determined to undertake all or a portion of the Improvements and to defray all or a portion of the cost thereof by the Assessments and is as set forth in the Assessment Report attached as **Exhibit B**.

3. **DESIGNATING THE NATURE AND LOCATION OF IMPROVEMENTS.** The nature and general location of, and plans and specifications for, the Improvements are described in Exhibit A and as set forth in the CIP, which is on file at the District Records Office. Exhibit B is also on file and available for public inspection at the same location.

4. **DECLARING THE TOTAL ESTIMATED COST OF THE IMPROVEMENTS, THE PORTION TO BE PAID BY ASSESSMENTS, AND THE MANNER AND TIMING IN WHICH THE ASSESSMENTS ARE TO BE PAID.**

A. The total estimated construction cost of the Improvements is **$90,549,000** (**"Estimated Cost"**).

B. The Assessments will defray approximately $115,325,000 which is the anticipated maximum par value of any bonds and which includes all or a portion of the Estimated Cost, as well as other financing-related costs, capitalized interest, and a debt service reserve as set forth in **Exhibit B**.

C. The manner in which the Assessments shall be apportioned and paid is set forth in the Assessment Report attached as **Exhibit B**, as may be modified by supplemental assessment resolutions. Commencing with the years in which the Assessments are certified for collection, the Assessments shall each be paid in not more than thirty (30) annual installments. The Assessments may be payable at the same time and in the same manner as are ad valorem taxes and collected pursuant to Chapter 197, *Florida Statutes*; provided, however, that in the event the uniform non-ad valorem assessment method of collecting the Assessments is not available to the District in any year, or if determined by the District to be in its best interest, the Assessments may be collected as is otherwise permitted by law, including but not limited to by direct bill. The decision to collect Assessments by any particular method – e.g., on the tax roll or by direct bill – does not mean that such method will be used to collect Assessments in future years, and the District reserves the right in its sole discretion to select collection methods in any given year, regardless of past practices.

5. **DESIGNATING THE LANDS UPON WHICH THE ASSESSMENTS SHALL BE LEVIED.** The Assessments shall be levied, within the District, on all lots and lands adjoining and contiguous or bounding and abutting upon such Improvements or specially benefitted thereby and further designated by the assessment plat hereinafter provided for.

6. **ASSESSMENT PLAT.** Pursuant to Section 170.04, *Florida Statutes*, there is on file, at the District Records Office, an assessment plat showing the area to be assessed, with certain plans and specifications describing the Improvements and the estimated cost of the Improvements, all of which are open to inspection by the public.

7. **PRELIMINARY ASSESSMENT ROLL.** Pursuant to Section 170.06, *Florida Statutes*, the District Manager has caused to be made a preliminary assessment roll, in accordance with the method of assessment described in Exhibit B hereto, which shows the lots and lands assessed, the amount of benefit to and the maximum assessment against each lot or parcel of land and the number of annual installments into which the assessment may be divided, which assessment roll is hereby adopted and approved as the District's preliminary assessment roll.

8. **PUBLIC HEARINGS DECLARED; DIRECTION TO PROVIDE NOTICE OF THE HEARINGS.** Pursuant to Sections 170.07 and 197.3632(4)(b), Florida Statutes, among other provisions of Florida law, there are hereby declared two (2) public hearings to be held as follows:

NOTICE OF PUBLIC HEARINGS

DATE: October 26, 2021
TIME: 9:30 a.m.
LOCATION: offices of Carlton Construction, Inc.
4615 U.S. Highway 17, Suite 1
Fleming Island, Florida 32003

The purpose of the public hearings is to hear comment and objections to the proposed special assessment program for District Improvements as identified in the CIP and the preliminary assessment roll, a copy of which is on file at the District Records Office. Interested parties may appear at that hearing or submit their comments in writing prior to the hearings at the District Records Office.

Notice of said hearings shall be advertised in accordance with Chapters 170 and 197, *Florida Statutes*, and the District Manager is hereby authorized and directed to place said notice in a newspaper of general circulation within Clay County (by two (2) publications one (1) week apart with the first publication at least twenty (20) days prior to the date of the hearing established herein). The District Manager shall file a publisher's affidavit with the District Secretary verifying such publication of notice. The District Manager is further authorized and directed to give thirty (30) days written notice by mail of the time and place of the hearing to the owners of all property to be assessed and include in such notice the amount of the assessment for each such property owner, a description of the areas to be improved and notice that information concerning all assessments may be ascertained at the District Records Office. The District Manager shall file proof of such mailing by affidavit with the District Secretary.

9. **PUBLICATION OF RESOLUTION.** Pursuant to Section 170.05, *Florida Statutes*, the District Manager is hereby directed to cause this Resolution to be published twice (once a week for two (2) weeks) in a newspaper of general circulation within Clay County and to provide such other notice as may be required by law or desired in the best interests of the District.

10. **CONFLICTS.** All resolutions or parts thereof in conflict herewith are, to the extent of such conflict, superseded and repealed.

11. **SEVERABILITY.** If any section or part of a section of this Resolution is declared invalid or unconstitutional, the validity, force, and effect of any other section or part of a section of this Resolution shall not thereby be affected or impaired unless it clearly appears that such other section or part of a section of this Resolution is wholly or necessarily dependent upon the section or part of a section so held to be invalid or unconstitutional.

12. **EFFECTIVE DATE.** This Resolution shall become effective upon its adoption.

PASSED AND ADOPTED this 27th day of August, 2021.

Attest: **CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT**

/S/Kristen Suit
Secretary/Assistant Secretary

/S/ Liam O'Reilly
Chair/Vice Chair, Board of Supervisors

Exhibit A: ***Capital Improvement Plan, dated August 26, 2021***
Exhibit B: ***Master Special Assessment Methodology Report, dated August 27, 2021***

Legal 48474 published Sept 30 and Oct 7, 2021 in Clay County's Clay Today newspaper

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

7B

Creekview Community Development District

OFFICE OF THE DISTRICT MANAGER

2300 Glades Road, Suite 410W●Boca Raton, Florida 33431

Phone: (561) 571-0010●Toll-free: (877) 276-0889●Fax: (561) 571-0013

Via First Class U.S. Mail

September 25, 2021

Bradley Creek Holdings LLC
1000 Riverside Ave
Ste 310
Jacksonville, FL 32204

RE: Creekview Community Development District
Notice of Hearing on Assessments to Property
See attached Legal Description (Exhibit A)

Dear Property Owner:

You are receiving this notice because Clay County records indicate that you are a property owner within the Creekview Community Development District ("**District**"). The District is a special-purpose unit of local government that was established pursuant to Chapter 190, *Florida Statutes*. The property that you own that is the subject of this notice is identified in the description attached as **Exhibit A**.

At the August 27,2021, meeting of the District's Board of Supervisors ("**Board**"), the District approved the *Creekview Community Development District Capital Improvement Plan, dated August 26, 2021* ("**Engineer's Report**"). A copy of the Engineer's Report is attached hereto as **Exhibit B.** The Engineer's Report describes various infrastructure improvements being considered by the Board which may be built or acquired by the District that benefit lands within the District, including but not limited to roadway improvements, water and sewer improvements, a stormwater management system, amenity improvements, and hardscape/landscape improvements as more specifically described in the Engineer's Report ("**Improvements**"). The Engineer's Report estimates that the total cost of the Improvements for the District's entire CIP is **$90,549,000**.

As a property owner of assessable land within the District, the District is considering assessing your property to fund the Improvements in the manner set forth in the District's *Master Special Assessment Methodology Report, dated August 23, 2021*, a copy of which is attached hereto as **Exhibit C** ("**Assessment Report**"). The Assessments will defray up to approximately **$115,325,000**, which includes the cost of the Improvements, plus financing-related costs, capitalized interest and a debt service reserve.

The purpose of any such assessment is to secure the bonds anticipated to be issued to finance the Improvements. As described in more detail in the Assessment Report, the District's assessments will ultimately be levied against all benefitted lands within the District. The Assessment Report identifies the physical area contained within the District and assessment for

the property that is expected to be assessed. Initially, the allocation of assessments for the Improvements to be funded by the District will be determined on an equal pro-rata gross acre basis. As land is platted, the allocation of assessments will be determined on a first-platted, first-assessed basis within the District, which will be assigned to those properties at the per-unit amounts as follows, based on each property type's Equivalent Residential Unit ("**ERU**") factor, and as explained in more detail in the Assessment Report ("**Maximum Assessments**"):

Land Use	Total # of Units / Acres	ERU Factor	Proposed Maximum Principal Per Unit	Proposed Maximum Annual Assessment Per Unit*
Townhome	102	0.60	$43,755.53	$3,455.21
Single Family 40'	32	0.80	$58,340.71	$4,606.94
Single Family 50'	698	1.00	$72,925.89	$5,758.68
Single Family 60'	553	1.20	$87,511.07	$6,910.42
Single Family 70'	95	1.40	$102,096.24	$8,062.15

** Includes costs of collection and assumes payment in March. All amounts stated herein are subject to change and/or final determination at the public hearings and meeting identified above. Specific maximum amounts expected per parcel or product type are as set forth in the Assessment Report.*

The total maximum assessment amount to be levied against each parcel, and the number of units contained within each parcel, is detailed in the Assessment Report, as such Assessment Report may be amended at the below referenced hearing. The total revenue that the District will collect by these assessments is anticipated to be **$115,325,000**, exclusive of anticipated fees and costs of collection and enforcement, discounts for early payment, and the annual interest costs of the debt issued to finance the Improvements. The maximum annual revenue that the District will collect by these assessments is anticipated to be $9,106,777.95, inclusive of anticipated fees and costs of collection and enforcement, discounts for early payment, and the annual interest costs, to be collected in not more than thirty (30) annual installments. The total assessment amount to be levied against property that you own is reflected on the preliminary assessment roll attached to the Assessment Report.

The assessments may appear on your regular tax bill issued by the Clay County Tax Collector. However, the District may in its discretion at any time choose instead to directly collect these assessments. As provided in the Assessment Report, the assessments will constitute a lien against your property that may be prepaid in accordance with Chapter 170, *Florida Statutes*, or may be paid in not more than thirty (30) annual installments. The failure to pay any assessments collected on the tax roll will cause a tax certificate to be issued against your property within the District which may result in a loss of title. Alternatively, if the assessments are directly collected, the failure to pay such direct bill invoice may result in the District pursuing a foreclosure action, which may result in a loss of title.

Notwithstanding the description of the Maximum Assessments herein, landowners will not have a payment obligation until the issuance of bonds, at which time the fixed assessment amounts securing those bonds, as well as a collection protocol, will be determined. The fixed assessment amounts will be determined at a public meeting, pursuant to a supplemental assessment resolution, engineer's report and methodology but will in no event exceed the

Maximum Assessments noticed herein. Please note that the preceding statement only applies to capital (debt) assessments and shall have no effect on the ability of the District to levy assessments and collect payments related to the operation and maintenance of the District.

In accordance with Chapters 170, 190 and 197, *Florida Statutes*, this letter is to notify you that a public hearing for the above-mentioned assessments will be held on **October 26, 2021, at 9:30 a.m. at the offices of Carlton Construction, Inc., 4615 U.S. Highway 17, Suite 1, Fleming Island, Florida 32003**. At this hearing, the Board will sit as an equalizing board to hear and consider testimony from any interested property owners as to the propriety and advisability of making the Improvements, or some phase thereof, as to the cost thereof, as to the manner of payment thereof, and as to the amount thereof to be assessed against each property so improved. All affected property owners have a right to appear at the hearing and to file written objections with the Board within twenty (20) days of this notice.

Information concerning the assessments and copies of applicable documents are on file and available during normal business hours at the District Manager's Office located at 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431, (877) 276-0889. You may appear at the hearing or submit your comments in advance to the attention of the District Manager at its address above.

Sincerely,

Craig Wrathell
District Manager

Enclosures
Exhibit A: Legal description of the Property
Exhibit B: *Creekview Community Development District Capital Improvement Plan,* dated August 26, 2021
Exhibit C: *Master Special Assessment Methodology Report,* dated August 27, 2021

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

7C

CREEKVIEW
COMMUNITY DEVELOPMENT DISTRICT
CAPITAL IMPROVEMENT PLAN

Prepared for

Board of Supervisors
Creekview
Community Development District

Prepared by
England-Thims & Miller, Inc.
14775 Old St. Augustine Road
Jacksonville, Florida 32258
904-642-8990

E 17-115-07

August 26, 2021

BACKGROUND

The Creekview Community Development District (the "District") is a 745± acre community development district located in Clay County, Florida. (See ***Plate 1,*** Location Map). The land within the District is currently an undeveloped parcel within the Lake Asbury Master Plan. The authorized land uses within the District include residential development as well as open space and recreational amenities. The full development within the District's boundaries is as depicted in Table 1.

TABLE 1

DEVELOPMENT SUMMARY

TYPE	**Area (Acres)**	**Residential Units**
Residential	468.0	1,480
Village Center	66.5	0
APF Road	13.4	0
Community Parks	13.6	0
Neighborhood Parks	17.0	0
Wetlands	109.3	0
Upland Buffer/Preservation	57.2	0
TOTALS	**745**	**1,480**

Plate 2 depicts the District boundary, and Plate 3 provides the legal description of the District.

The currently proposed development program for the District is presented below. The current proposed Master Plan is depicted on Plate 9.

TABLE 2

UNIT TYPE	**TOTAL**
Townhomes	102
40'	32
50'	698
60'	553
70'	95
TOTALS	**1,480**

To serve the residents of the District, the District has developed this Capital Improvement Plan to allow it to finance and construct certain utility, stormwater management, amenity and transportation infrastructures necessary for development within the District. Summaries of the proposed Capital Improvement Plan and corresponding cost estimates follow in Table 3. A description and basis of costs for each improvement is included in this report.

The Capital Improvement Plan contained in this report reflects the current intentions of the District. However, the Capital Improvement Plan may be subject to modification in the future. The implementation of any improvement is outlined within the Plan requires final approval by the District's Board of Supervisors.

Design and permitting for the improvements described in this improvement plan is ongoing, and a tentative schedule is provided below:

ITEM	ESTIMATED AGENCY APPROVAL DATE
1. U.S. Army Corps of Engineers	Pending for entire project
2. SJRWMD Construction ERP	Pending for Areas 1, 2 and 5
3. Clay County Utility Authority (CCUA)	Pending for Areas 1, 2 and 5
4. Clay County Development Review Committee	Pending for Areas 1, 2 and 5

A conceptual permit for the entire property within the District has been completed and approved by the St. Johns River Water Management District (SJRWMD). A U.S. Army Corps of Engineers (USACE) permit for the entire property within the District is pending. A SJRWMD Construction ERP permit application has been submitted for Areas 1, 2 and 5. Construction plan approvals from Clay County will be obtained for the residential development portions of the property by phases, which is currently anticipated to total 1,480 residential units. There is a reasonable expectation that the remaining required permits for the District improvements are obtainable, however, all permits are subject to final agency action.

Cost estimates contained in this report are based upon year 2021 dollars and have been prepared based upon the best available information, but in some cases without benefit of final engineering design and environmental permitting. England, Thims & Miller, Inc. believes the estimates to be accurate based upon the available information, however, actual costs will vary based on final engineering, planning and approvals from regulatory agencies.

PROJECT PHASING

The overall Project will be built in a series of phases. The phasing of the project allows the clearing, earthwork, stormwater management systems, roadways, utilities, entry features, recreational areas, landscaping, sidewalks and paths to be constructed as needed throughout the build-out of the District. The Project has been designed in such a manner so that Areas 1, 2 and 5 can be developed and be self-sufficient, completely separate from the other Areas.

TABLE 3

SUMMARY OF COSTS

Improvement Description	Estimated Cost
Stormwater Management System	$32,013,500
Roadway Improvements	$27,067,000
Water, Sewer and Reuse Systems	$24,268,500
Amenities, Entry Feature and Landscaping	$ 7,200,000
MASTER INFRASTRUCTURE TOTAL	**$90,549,000**

Note: The above cost includes $9,199,000 for the APF Road, which is an improvement that is subject to an impact fee credit agreement.

INFRASTRUCTURE IMPROVEMENTS

The District currently intends to finance, design and construct certain infrastructure improvements for the residential development within the District boundaries. The improvements include complete construction of the basic infrastructure for each neighborhood, including but not limited to: clearing and grubbing, earthwork, water and sewer underground utility construction, drainage, stormwater management, grassing, sodding, Clay Electric underground electrical conduit and neighborhood street lighting. Refer to Plates 4-8 for the infrastructure improvements.

The cost estimate for the roadways included for the infrastructure improvements is based upon curb and gutter section roadways with variable pavement widths, within variable width rights-of-way. The clearing, grubbing and earthwork estimates include all work necessary for the complete right-of-way area, and include utility easements for underground electrical conduit for roadway street lighting. Disturbed areas within the rights-of-way, which are outside of the paved areas, will be sodded and/or seeded and grassed in order to provide erosion and sediment control in accordance with Clay County standards.

Stormwater management cost estimates included in the infrastructure improvements provide for the attenuation and treatment of stormwater runoff from the project in accordance with St. Johns River Water Management District and Clay County standards. Costs include detention pond construction, outfall control structures, and any site fill required to provide a complete stormwater management system.

Water, sewer and reuse cost estimates included in the residential master infrastructure improvements consist of the underground water and reuse transmission systems and wastewater (sewer) collection system serving the development. Costs include piping, manholes, valves, services, and all appurtenances required to construct the system in accordance with CCUA and Florida Department of Environmental Protection standards.

The infrastructure improvements shall be designed and constructed to Clay County, CCUA, Florida Department of Environmental Protection, and St. Johns River Water Management District standards. Roadways shall be owned and maintained by the District, with the exception of the APF Road, which will be owned and maintained by Clay County. Water, reuse and sewer facilities shall be owned and maintained by CCUA. The neighborhood street lighting shall be owned and operated by Clay Electric, and the cost to operate them is presently expected to be paid by the District. The District shall maintain stormwater management improvements.

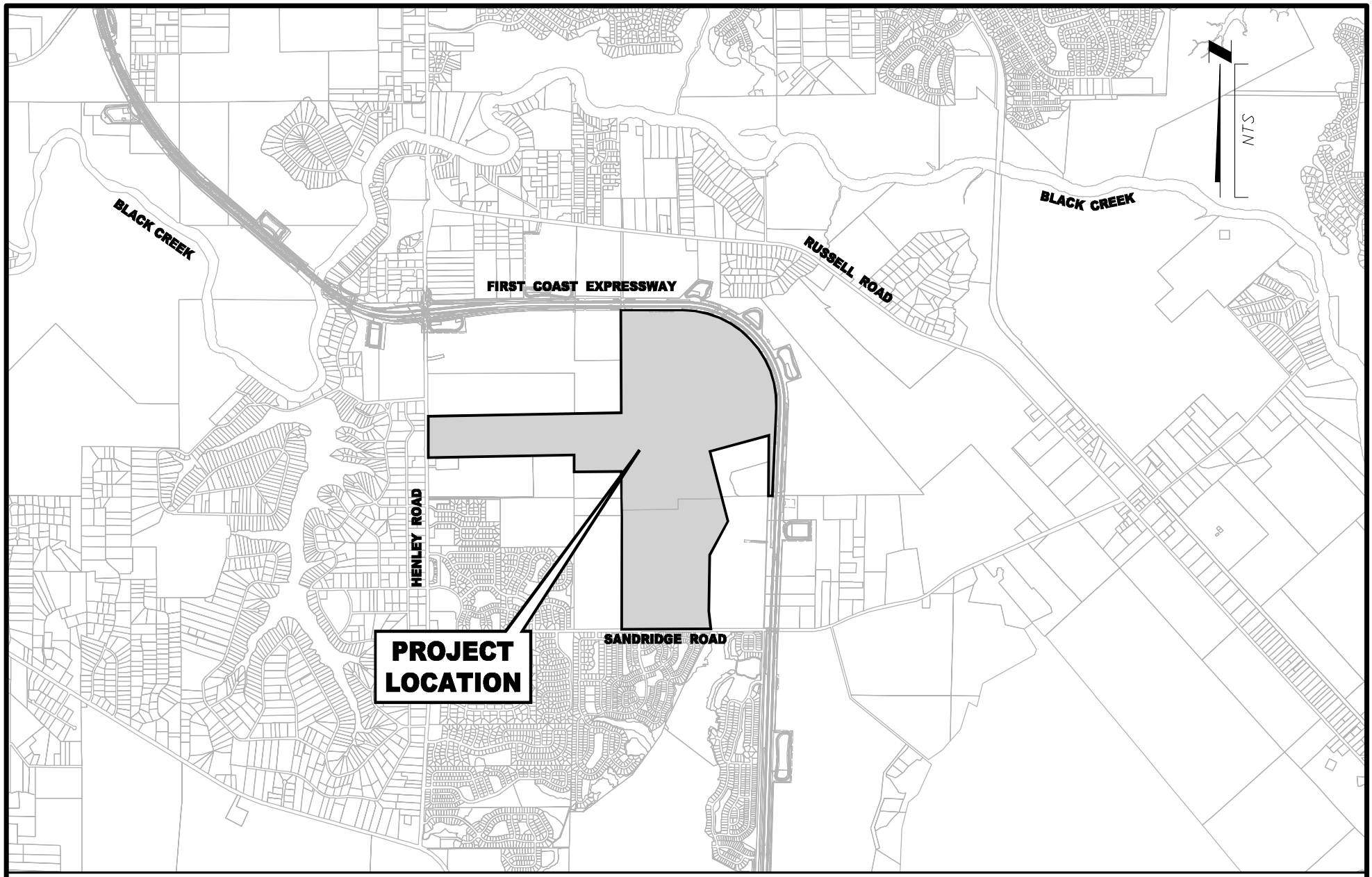
BASIS OF COST ESTIMATE FOR INFRASTRUCTURE IMPROVEMENTS

The following is the basis for the infrastructure cost estimates:

- Costs utilized were obtained from recent bids on similar projects.
- Water, Reuse and Sewer Facilities are designed in accordance with CCUA and FDEP standards.
- The stormwater management system is designed pursuant to SJRWMD and Clay County standards and the cost estimate has been developed from recent bids.
- The engineering, permitting, construction inspection and other soft cost fees have been included in the estimated cost.
- For the purpose of this report, a 10% contingency factor has been included for infrastructure.
- Costs have been included for street lighting and electrical conduit on all roadways in accordance with Clay Electric standards.
- Cost estimates contained in this report are based upon year 2021 dollars and have been prepared based upon the best available information, but in some cases, without benefit of final engineering design and environmental permitting. England-Thims & Miller, Inc. believes the enclosed estimates to be accurate based upon the available information, however, actual costs will vary based upon final engineering, planning and approvals from regulatory authorities.

APPENDIX
Description

Plate Number	
1	Location Map
2	District Boundary
3	District Legal Description
4	Water Distribution System
5	Sanitary Sewer Collection System
6	Stormwater Management System
7	Neighborhood/APF Roads
8	Amenities, Parks and Entry Features
9	Master Plan



ETM
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ENGLAND - THIMS & MILLER, INC.
14775 Old St. Augustine Road, Jacksonville, FL 32258
TEL: (904) 642-8990, FAX: (904) 646-9485
REG - 2584 LC - 0000316

LOCATION MAP

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

CLAY COUNTY, FLORIDA

ETM NO. 17-115-07

DRAWN BY: MAJ

DATE: JULY 28 2021

PLATE 1

T:\2017\17-115\17-115-07\LandDev\Design\Plots\Exhibits\CDD\Plate 1 LOCATION MAP.dwg

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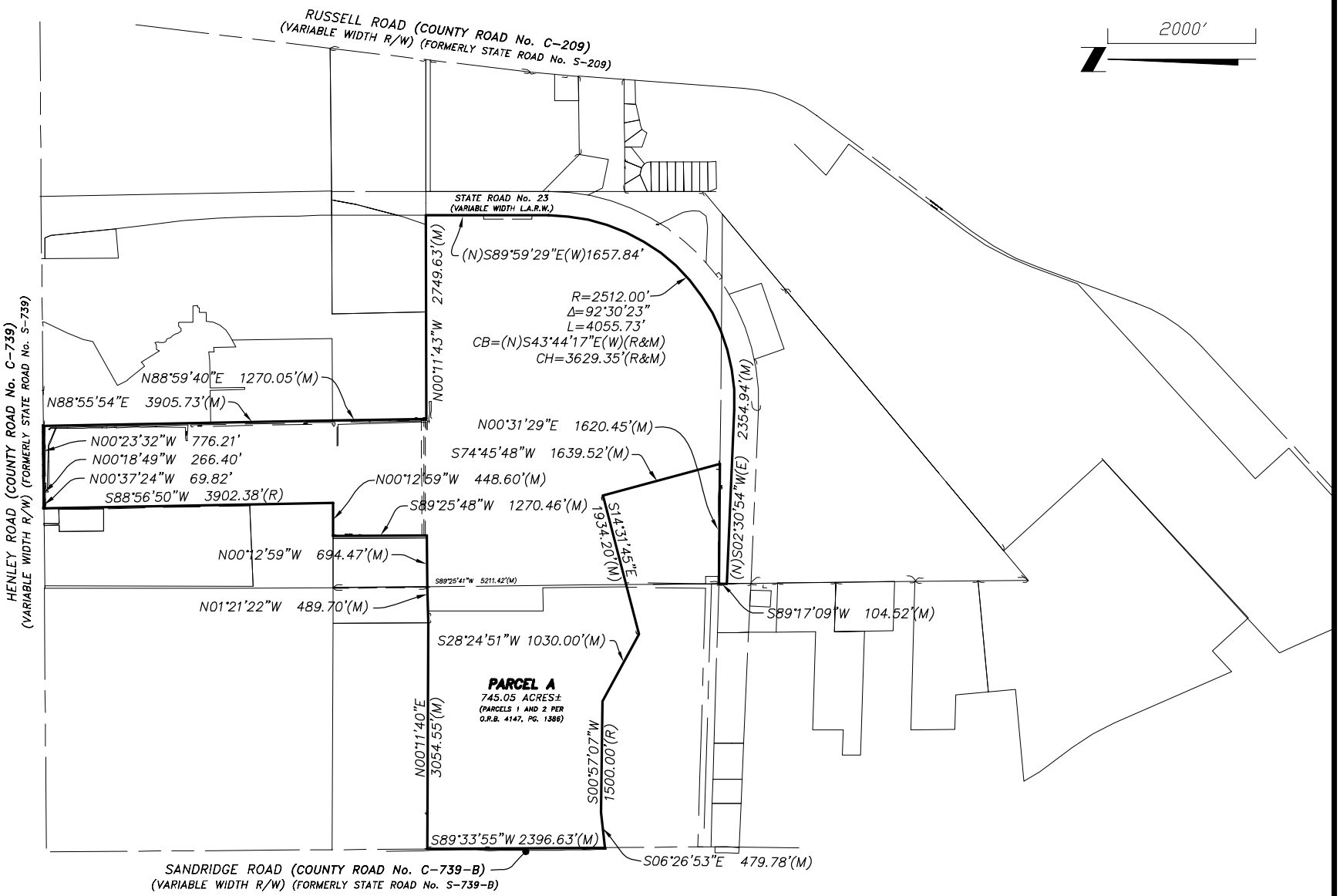

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DISTRICT BOUNDARY

CREEKVIEW COMMUNITY DEVELOMENT DISTRICT

CLAY COUNTY, FLORIDA

ETM NO. 17-115-07
DRAWN BY: MAJ
DATE: JULY 28 2021
DRAWING NO. PLATE 2

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Work Order No. 20-142.01
File No. 127B-36.00A

SURVEYOR'S DESCRIPTION

PARCEL A:
A portion of Sections 14, 15, 16 and 22, Township 5 South, Range 25 East, Clay County, Florida, being all of Parcels 1 and 2, as described and recorded in Official Records Book 4147, page 1386, of the Public Records of said county, be more particularly described as follows:

For a Point of Beginning, commence at the Southeast corner of said Section 15; thence North 00°31'29" East, along the Easterly line of said Section 15, a distance of 1620.45 feet to an angle point in the Southerly boundary line of said Parcel 2, of Official Records Book 4147, page 1386; thence South 74°45'48" West, departing said Easterly line and along said Southerly boundary line, 1639.52 feet to a point lying on the Easterly line of Exception Parcel A, as described and recorded in Official Records Book 1598, page 1299, of said Public Records; thence South 14°31'45" East, along said Easterly line and along the Easterly line of Exception Parcel C, as described and recorded in said Official Records Book 1598, page 1299, a distance of 1934.20 feet; thence Southerly continuing along said Easterly line of Exception Parcel C the following 3 courses: Course 1, thence South 28°24'51" West, 1030.00 feet; Course 2, thence South 00°57'07" West, 1500.00 feet; Course 3, thence South 06°26'53" East, 479.78 feet to the Southeasterly corner thereof, said corner lying on the Northerly right of way line of Sandridge Road (County Road No. C-739-B) (formerly State Road No. S-739-B), a variable width right of way as presently established; thence South 89°33'55" West, along said Northerly right of way line, 2396.63 feet to the Southeasterly corner of those lands described and recorded in Official Records Book 1421, page 1951, of said Public Records; thence North 00°11'40" East, departing said Northerly right of way line and along the Easterly line of said Official Records Book 1421, page 1951, a distance of 3054.55 feet to the Northeasterly corner thereof, said corner also being the Southeasterly corner of those lands described and recorded in Official Records Book 2061, page 1775, of said Public Records; thence North 01°21'22" West, along the Easterly line of said Official Records Book 2061, page 1775, a distance of 489.70 feet to the Northeasterly corner thereof, said corner also being the Southeasterly corner of Parcel 1, as described and recorded in Official Records Book 1486, page 381, of said Public Records; thence North 00°12'59" West, along the Easterly line of last said Parcel 1 and along the Easterly line of those lands described and recorded in Official Records Book 1711, page 652, of said Public Records, 694.47 feet to a point lying on said Southerly boundary line of Parcel 2, of Official Records Book 4147, page 1386; thence South 89°25'48" West, along said Southerly boundary line of Parcel 2, a distance of 1270.46 feet to a point lying on the Easterly line of Parcel "A" as described and recorded in Official Records Book 4173, page 490, of said Public Records; thence North 00°12'59" West, along said Easterly line, 448.60 feet to the Northeasterly corner thereof; thence South 88°56'50" West, along the Northerly line of said Parcel "A", and along the Northerly lines of those lands described and recorded in Official Records Book 4173, page 493 (Parcel "B"), and Official Records Book 4178, page 1821, all of said Public Records, a distance of 3902.38 feet to its intersection with the Easterly right of way line of Henley Road (County Road No. C-739) (formerly State Road No. S-739), a variable width right of way as presently established; thence Northerly along said Easterly right of way line the following 3 courses: Course 1, thence North 00°37'24" West, departing last said Northerly line, 69.82 feet; Course 2, thence North 00°18'49" West, 266.40 feet; Course 3, thence North 00°23'32" West, 776.21 feet to the Southwesterly corner of those lands described and recorded in Official Records Book 4167, page 1057, of said Public Records; thence North 88°55'54" East, departing said Easterly right of way line, along the Southerly line of said Official Records Book 4167, page 1057, and along the Southerly line of those lands described and recorded in Official Records Book 2673, page 522, of said Public Records, a distance of 3905.73 feet to the Southeasterly corner thereof, said corner also being the Southwesterly corner of those lands described and recorded in Official Records Book 2374, page 885, of said Public Records; thence North 88°59'40" East, along the Southerly line of said Official Records Book 2374, page 885, a distance of 1270.05 feet to the Southeasterly corner thereof; thence North 00°11'43" West, along the Easterly line of said Official Records Book 2374, page 885, and along the Easterly lines of those lands described and recorded in Official Records Book 2374, page 892, and Official Records Book 2859, page 403, all of said Public Records, 2749.63 feet to a point lying on the boundary line of State Road No. 23, Parcel 114, Part "A", a variable width limited access right of way as described and recorded in Official Records Book 4085, page 409, of said Public Records; thence Southeasterly along said boundary line of State Road No. 23 the following 3 courses: Course 1, thence South 89°59'29" East, departing said Easterly line of Official Records Book 2859, page 403, a distance of 1657.84 feet to the point of curvature of a curve concave Southwesterly having a radius of 2512.00 feet; Course 2, thence Southeasterly along the arc of said curve, through a central angle of 92°30'23", an arc length of 4055.73 feet to the point of tangency of said curve, said arc being subtended by a chord bearing and distance of South 43°44'17" East, 3629.35 feet; Course 3, thence South 02°30'54" West, 2354.94 feet to the Westerly corner of the Southerly terminus of said Parcel 114, Part "A", said corner lying on the Southerly line of said Section 14; thence South 89°17'09" West, along said Southerly line, 104.52 feet to the Point of Beginning.

Containing 745.05 acres, more or less.

ETM
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REG - 2584 LC - 0000316

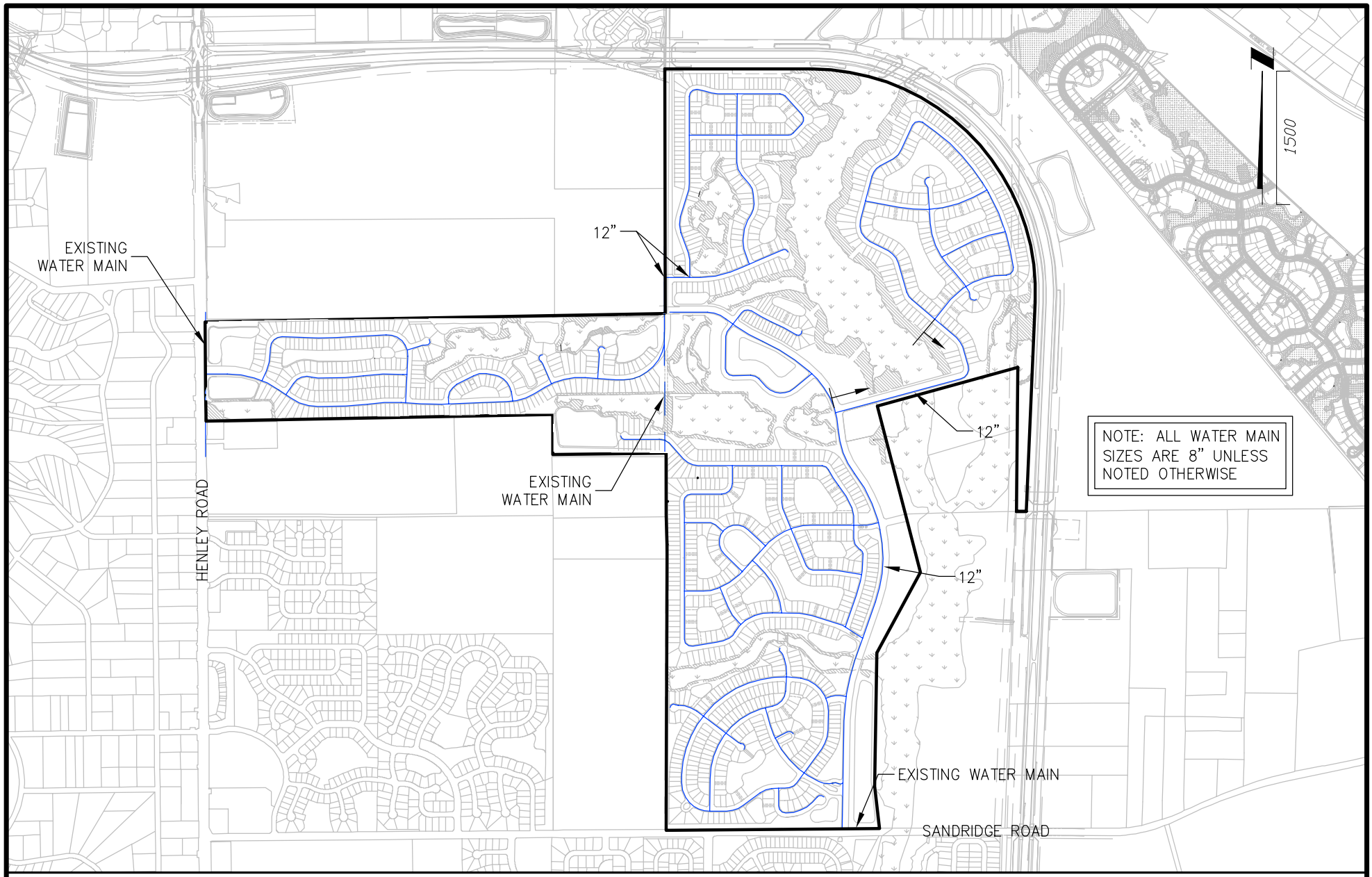
DISTRICT LEGAL DESCRIPTION

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

CLAY COUNTY, FLORIDA

ETM NO. 17-115-07
DRAWN BY: MAJ
DATE: JULY 28 2021
PLATE 3

T:\2017\17-115\17-115-07\LandDev\Design\Plots\Exhibits\CDD\Plate 3 DISTRICT LEGAL DESCRIPTION.dwgPLOTTED: July 28, 2021 - 2:34 PM, BY: Mark Jeter



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WATER DISTRIBUTION SYSTEM

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

CLAY COUNTY, FLORIDA

ETM NO. 17-115-07

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DATE: JULY 28 2021

PLATE 4

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SANITARY SEWER COLLECTION SYSTEM

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

CLAY COUNTY, FLORIDA

ETM NO. 17-115-07

DRAWN BY: MAJ

DATE: JULY 28 2021

PLATE 5

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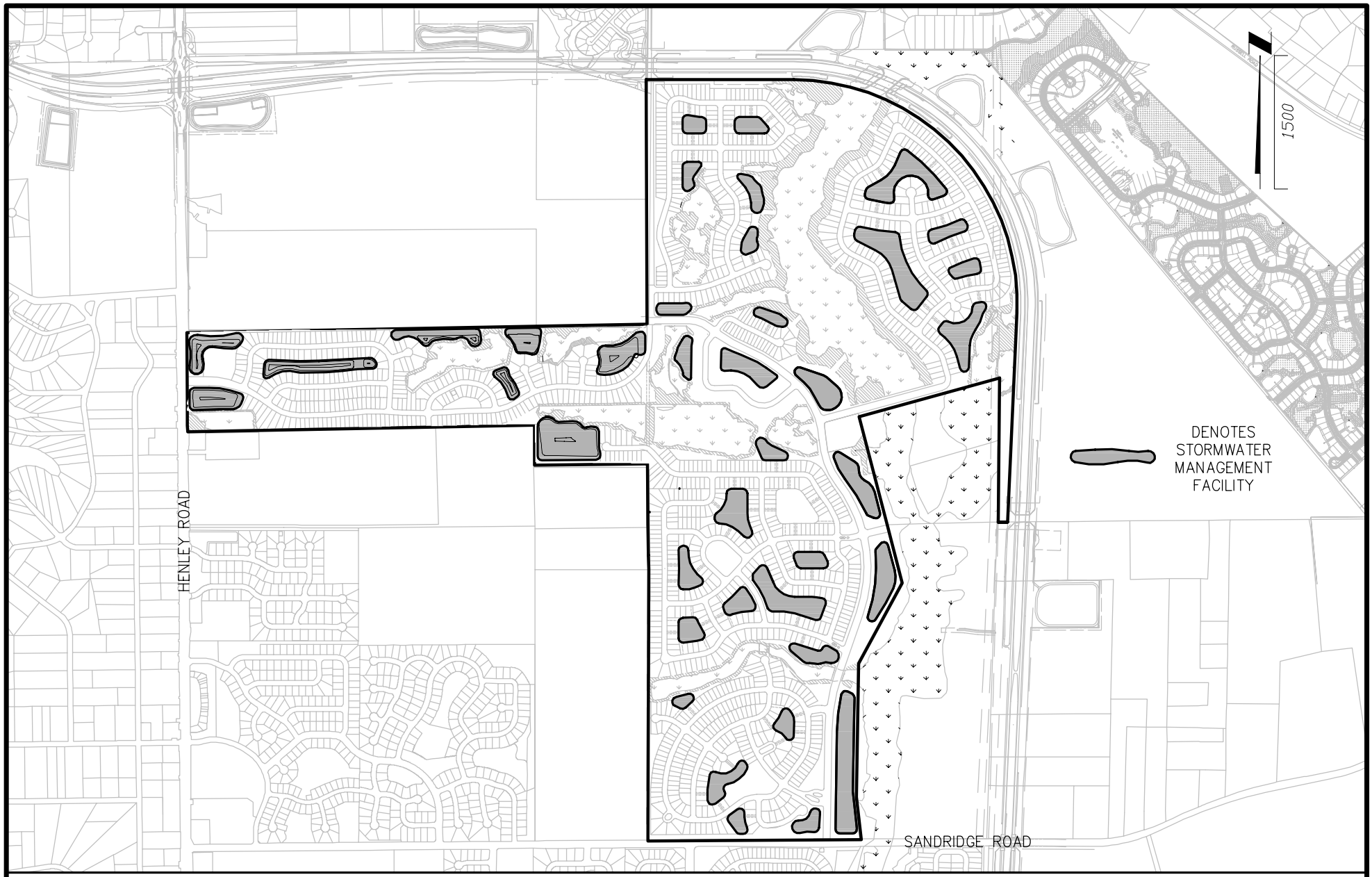

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STORM WATER MANAGEMENT SYSTEM

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

CLAY COUNTY, FLORIDA

ETM NO. 17-115-07

DRAWN BY: MAJ

DATE: JULY 28 2021

PLATE 6

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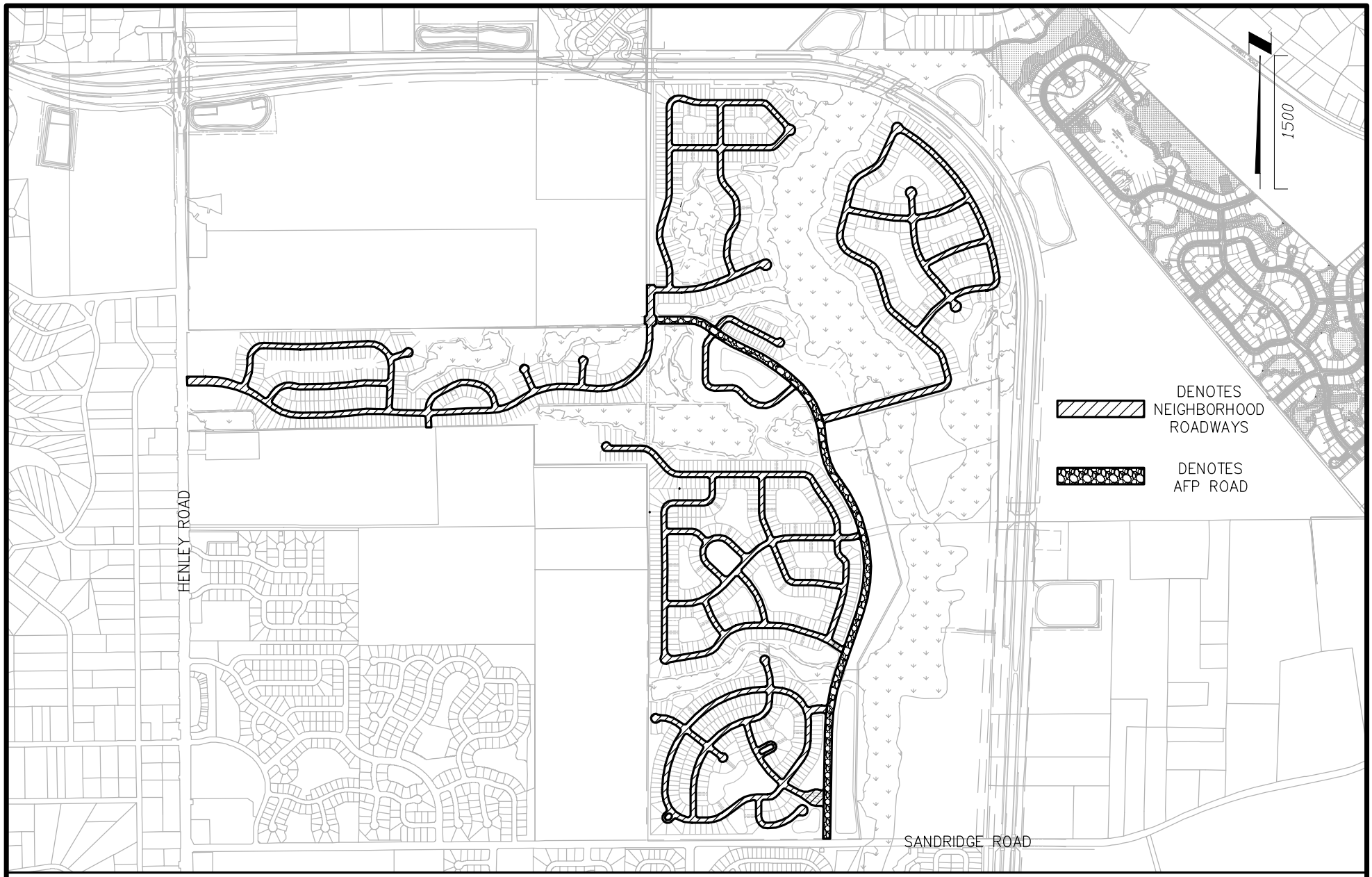

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NEIGHBORHOOD AND APF ROADS

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

CLAY COUNTY, FLORIDA

ETM NO. 17-115-07

DRAWN BY: MAJ

DATE: JULY 28 2021

PLATE 7

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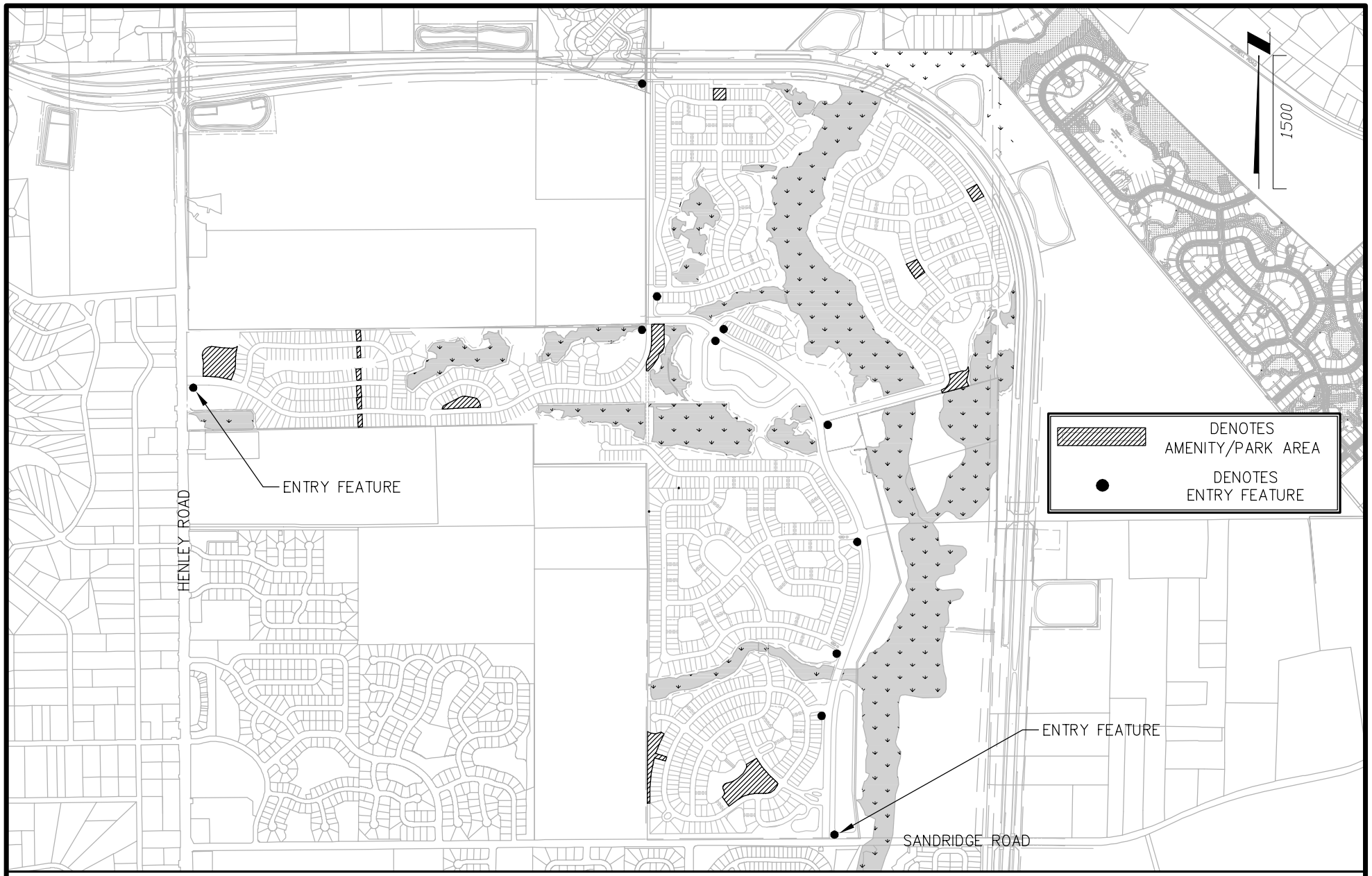

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AMENITIES, PARKS AND ENTRY FEATURES

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

CLAY COUNTY, FLORIDA

ETM NO. 17-115-07

DRAWN BY: MAJ

DATE: JULY 28 2021

PLATE 8

T:\2017\17-115\17-115-07\LandDev\Design\Plots\Exhibits\CDD\PLATE 8 AMENITIES AND ENTRY FEATURES.DWG PLOTTED: July 28, 2021 - 2:27 PM, BY: Mark Jeter

CREEKVIEW TRAIL LOT MIX

AREA	40'	50'	60'	70'	Townhomes	TOTAL
1	–	158	82	–	–	240
2	–	9	47	–	–	56
3	32	–	–	–	102	134
4A	–	60	91	–	–	151
4B	–	–	95	95	–	190
5A	–	93	20	–	–	113
5B	–	92	37	–	–	129
6	–	151	56	–	–	207
7	–	135	125	–	–	260
TOTAL	32	698	553	95	102	1,480

ETM
VISION - EXPERIENCE - RESULTS
ENGLAND - THIMS & MILLER, INC.
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MASTER PLAN

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

CLAY COUNTY, FLORIDA

ETM NO. 17-115-07

DRAWN BY: MAJ

DATE: JULY 28 2021

PLATE 9

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CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

7D

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

Master Special Assessment
Methodology Report

August 27, 2021

Provided by:

Wrathell, Hunt and Associates, LLC
2300 Glades Road, Suite 410W
Boca Raton, FL 33431
Phone: 561-571-0010
Fax: 561-571-0013
Website: www.whhassociates.com

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1.0 Introduction

1.1 Purpose

This Master Special Assessment Methodology Report (the "Report") was developed to provide a master financing plan and a master special assessment methodology for the Creekview Community Development District (the "District"), located in Clay County, Florida, as related to funding the costs of the acquisition and construction of public infrastructure improvements contemplated to be provided by the District.

1.2 Scope of the Report

This Report presents projections for financing the District's public infrastructure improvements (the "Capital Improvement Plan") as described in the Creekview Community Development District Capital Improvement Plan, prepared by England-Thims & Miller, Inc. dated August 26, 2021 (the "Engineer's Report"), as well as describes the method for the allocation of special benefits and the apportionment of special assessment debt resulting from the provision and funding of the Capital Improvement Plan.

The District plans to issue tax-exempt bonds in one or more series (the "Bonds") for the purpose of financing the Capital Improvement Plan described in the Engineer's Report.

To secure the Bonds, the District also intends to impose non-ad valorem special assessments on the benefited lands within the District based on this Report. It is anticipated that the proposed special assessments will be collected through the Uniform Method of Collection described in Chapter 197.3632, Florida Statutes, or collected directly, or through any other legal means available to the District. It is not the intent of this Report to address any other assessments, if applicable, that may be levied by the District, a homeowner's association, or any other unit of government.

1.3 Special Benefits and General Benefits

Improvements undertaken and funded by the District as part of the Capital Improvement Plan create special and peculiar benefits, different in kind and degree than general benefits, for properties within its borders as well as general benefits to the public at large. However, as discussed within this Report, these general benefits are

incidental in nature and are readily distinguishable from the special and peculiar benefits which accrue to property within the District. The District's Capital Improvement Plan enables properties within its boundaries to be developed.

There is no doubt that the general public, property owners, and property outside the District will benefit from the provision of the Capital Improvement Plan. However, these benefits are only incidental since the Capital Improvement Plan is designed solely to provide special benefits peculiar to property within the District. Properties outside the District are not directly served by the Capital Improvement Plan and do not depend upon the Capital Improvement Plan to obtain or to maintain their development entitlements. This fact alone clearly distinguishes the special benefits which District properties receive compared to those lying outside of the District's boundaries.

The Capital Improvement Plan will provide infrastructure and improvements which are all necessary in order to make the lands within the District developable and saleable. The installation of such improvements will cause the value of the developable and saleable lands within the District to increase by more than the sum of the financed cost of the individual components of the Capital Improvement Plan. Even though the exact value of the benefits provided by the Capital Improvement Plan is hard to estimate at this point, it is without doubt greater than the costs associated with providing same.

1.4 Organization of the Report

Section Two describes the development program as proposed by the Developer, as defined below.

Section Three provides a summary of the Capital Improvement Plan as determined by the District Engineer.

Section Four discusses the current financing program for the District.

Section Five discusses the special assessment methodology for the District.

2.0 Development Program

2.1 Overview

The District serves the Creekview development (the "Development" or "Creekview"), a master planned, residential development located in Clay County, Florida. The land within the District currently consists of approximately 745.00 +/- acres and is generally located to the north of Sandridge Road, south of the First Coast Expressway, and east of Henley Road.

2.2 The Development Program

The development of Creekview is anticipated to be conducted by the GreenPointe Developers, LLC or its associates (the "Developer"). Based upon the information provided by the Developer, the current development plan envisions a total of 1,480 residential units developed in multiple phases, although land use types and unit numbers may change throughout the development period. Table 1 in the *Appendix* illustrates the development plan for the District.

3.0 The Capital Improvement Plan

3.1 Overview

The public infrastructure costs to be funded by the District are described by the District Engineer in the Engineer's Report. Only public infrastructure that may qualify for bond financing by the District under Chapter 190, Florida Statutes and under the Internal Revenue Code of 1986, as amended, was included in these estimates.

3.2 Capital Improvement Plan

The Capital Improvement Plan needed to serve the Development is projected to consist of stormwater management facilities, roadway improvements, water, sewer, and reuse systems, amenities, entry features, and landscaping as set forth in more detail in the Engineer's Report.

The infrastructure included in the Capital Improvement Plan will comprise an interrelated system of improvements, which means that

all of the improvements will serve the entire District and improvements will be interrelated such that they will reinforce one another. At the time of this writing, the total costs of the Capital Improvement Plan are estimated at $90,549,000. Table 2 in the *Appendix A* illustrates the specific components of the Capital Improvement Plan and their costs.

4.0 Financing Program

4.1 Overview

As noted above, the District is embarking on a program of capital improvements which will facilitate the development of lands within the District. Generally, construction of public improvements is either funded by the Developer and then acquired by the District or funded directly by the District. The choice of the exact mechanism for providing public infrastructure has not yet been made at the time of this writing, and the District may either acquire the public infrastructure from the Developer or construct it, or even partly acquire it and partly construct it.

Even though the actual financing plan may change to include multiple series of bonds, it is likely that in order to fully fund the costs of the Capital Improvement Plan as described in *Section 3.2* in one financing transaction, the District would have to issue approximately $115,325,000 in par amount of special assessment bonds.

Please note that the purpose of this Report is to allocate the benefit of the Capital Improvement Plan to the various land uses in the District and based on such benefit allocation to apportion the maximum debt necessary to fund the Capital Improvement Plan. The discussion of the structure and size of the indebtedness is based on various estimates and is subject to change.

4.2 Types of Bonds Proposed

The proposed financing plan for the District provides for the issuance of the Bonds in the principal amount of $115,325,000 to finance Capital Improvement Plan costs at $90,549,000. The Bonds as projected under this master financing plan would be structured to be amortized in 30 annual installments following a 24- month capitalized interest period. Interest payments on the Bonds would be made

every May 1 and November 1, and principal payments on the Bonds would be made every November 1.

In order to finance the improvement costs, the District would need to borrow more funds and incur indebtedness in the total amount of $115,325,000. The difference is comprised of debt service reserve, capitalized interest, and costs of issuance, including the underwriter's discount. Preliminary sources and uses of funding for the Bonds are presented in Table 3 in the *Appendix*.

Please note that the structure of the Bonds as presented in this Report is preliminary and may change due to changes in the development program, market conditions, timing of infrastructure installation as well as for other reasons. The District maintains complete flexibility as to the structure of the Bonds and reserves the right to modify it as necessary.

5.0 Assessment Methodology

5.1 Overview

The issuance of the Bonds provides the District with funds necessary to construct/acquire the infrastructure improvements which are part of the Capital Improvement Plan outlined in *Section 3.2* and described in more detail by the District Engineer in the Engineer's Report. These improvements lead to special and general benefits, with special benefits accruing to properties within the boundaries of the District. General benefits accrue to areas outside the District, and are only incidental in nature. The debt incurred in financing the public infrastructure will be secured by assessing properties that derive special and peculiar benefits from the Capital Improvement Plan. All properties that receive special benefits from the Capital Improvement Plan will be assessed for their fair share of the debt issued in order to finance the Capital Improvement Plan.

5.2 Benefit Allocation

The current development plan for the District envisions the development of a total of 1,480 residential units developed in multiple phases, although unit numbers and land use types may change throughout the development period.

The public infrastructure included in the Capital Improvement Plan will comprise an interrelated system of improvements, which means

that all of the improvements will serve the entire District and such public improvements will be interrelated such that they will reinforce each other and their combined benefit will be greater than the sum of their individual benefits. All of the land uses within the District will benefit from each infrastructure improvement category, as the improvements provide basic infrastructure to all land within the District and benefit all land within the District as an integrated system of improvements.

As stated previously, the public infrastructure improvements included in the Capital Improvement Plan have a logical connection to the special and peculiar benefits received by the land within the District, as without such improvements, the development of the properties within the District would not be possible. Based upon the connection between the improvements and the special and peculiar benefits to the land within the District, the District can assign or allocate a portion of the District's debt through the imposition of non-ad valorem assessments, to the land receiving such special and peculiar benefits. Even though these special and peculiar benefits are real and ascertainable, the precise amount of the benefit cannot yet be calculated with mathematical certainty. However, such benefit is more valuable than the cost of, or the actual non-ad valorem assessment amount levied on that parcel.

The proposed Development plan is expected to encompass 1,480 residential units. This Report proposes to allocate the benefit associated with the Capital Improvement Plan to the different product types proposed to be developed within the District in proportion to their density of development and intensity of use of infrastructure as measured by a standard unit called an Equivalent Residential Unit ("ERU"). Table 4 in the *Appendix* illustrates the ERU weights that are proposed to be assigned to the product types contemplated to be developed within the District based on the densities of development and the intensities of use of infrastructure, total ERU counts for each product type, and the share of the benefit received by each product type.

The rationale behind the different ERU weights is supported by the fact that generally and on average products with smaller lot sizes will use and benefit from the improvements which are part of the Capital Improvement Plan less than products with larger lot sizes. For instance, generally and on average products with smaller lot sizes will produce less storm water runoff, may produce fewer vehicular trips, and may need less water/sewer capacity than products with larger lot sizes. Additionally, the value of the products with larger lot sizes is likely to appreciate by more in terms of dollars than that of

the products with smaller lot sizes as a result of the implementation of the infrastructure improvements. As the exact amount of the benefit and appreciation is not possible to be calculated at this time, the use of ERU measures serves as a reasonable approximation of the relative amount of benefit received from the District's public infrastructure improvements that are part of the Capital Improvement Plan.

Table 5 in the *Appendix* presents the apportionment of the assessment associated with the Bonds (the "Bond Assessment") in accordance with the ERU benefit allocation method presented in Table 4. Table 5 also presents the annual levels of the debt service assessments per unit.

5.3 Assigning Bond Assessment

As the land in the District is not yet platted for its intended final use and the precise location of the residential units by lot or parcel is unknown, the Bond Assessment will initially be levied on all developable lands in the District on an equal pro-rata gross acre basis, thus the total bonded debt in the amount of $115,325,000 will be preliminarily levied on approximately 745.00 +/- gross acres at a rate of $154,798.66 per acre.

When the land is platted, the Bond Assessment will be allocated to each platted parcel on a first platted-first assigned basis based on the planned use for that platted parcel as reflected in Table 5 in the *Appendix*. Such allocation of Bond Assessment from unplatted gross acres to platted parcels will reduce the amount of Bond Assessment levied on unplatted gross acres within the District.

Further, to the extent that any parcel of land which has not been platted is sold to another developer or builder, the Bond Assessment will be assigned to such parcel at the time of the sale based upon the development rights associated with such parcel that are transferred from seller to buyer. The District shall provide an estoppel or similar document to the buyer evidencing the amount of Bond Assessment transferred at sale.

5.4 Lienability Test: Special and Peculiar Benefit to the Property

As first discussed in *Section 1.3*, Special Benefits and General Benefits, improvements undertaken by the District create special and peculiar benefits to certain properties within the District. The District's improvements benefit assessable properties within the District and accrue to all such assessable properties on an ERU basis.

Improvements undertaken by the District can be shown to be creating special and peculiar benefits to the property within the District. The special and peculiar benefits resulting from each improvement are:

a. added use of the property;
b. added enjoyment of the property;
c. decreased insurance premiums; and
d. increased marketability and value of the property.

The improvements which are part of the Capital Improvement Plan make the land in the District developable and saleable and when implemented jointly as parts of the Capital Improvement Plan, provide special and peculiar benefits which are greater than the benefits of any single category of improvements. These special and peculiar benefits are real and ascertainable, but not yet capable of being calculated and assessed in terms of numerical value; however, such benefits are more valuable than either the cost of, or the actual assessment levied for, the improvement or debt allocated to the parcel of land.

5.5 Lienability Test: Reasonable and Fair Apportionment of the Duty to Pay

A reasonable estimate of the proportion of special and peculiar benefits received from the improvements is delineated in Table 4 (expressed as ERU factors) in the *Appendix*.

The apportionment of the assessments is fair and reasonable because it was conducted on the basis of consistent application of the methodology described in *Section 5.2* across all assessable property within the District according to reasonable estimates of the special and peculiar benefits derived from the Capital Improvement Plan.

Accordingly, no acre or parcel of property within the District will be liened for the payment of any non-ad valorem special assessment more than the determined special benefit peculiar to that property.

5.6 True-Up Mechanism

The assessment methodology described herein is based on conceptual information obtained from the Developer prior to construction. As development occurs it is possible that the number of ERUs may change. The mechanism for maintaining the methodology over the changes is referred to as true-up.

This mechanism is to be utilized to ensure that the Bond Assessment on a per ERU basis never exceeds the initially allocated assessment as contemplated in the adopted assessment methodology. Bond Assessment per ERU preliminarily equals $72,925.89 ($115,325,000 in Bond Assessment divided by 1,581.40 ERUs) and may change based on the final bond sizing. If such changes occur, the Methodology is applied to the land based on the number of and type of units of particular land uses within each and every parcel as signified by the number of ERUs.

As the land in the District is platted, the Bond Assessment is assigned to platted parcels based on the figures in Table 5 in the *Appendix.* If as a result of platting and apportionment of the Bond Assessment to the platted parcels, the Bond Assessment per ERU for land that remains unplatted remains equal to $72,925.89, then no true-up adjustment will be necessary.

If as a result of platting and apportionment of the Bond Assessment to the platted parcels the Bond Assessment per ERU for land that remains unplatted equals less than $72,925.89 (for instance as a result of a larger number of units) then the per ERU Bond Assessment for all parcels within the District will be lowered if that state persists at the conclusion of platting of all land within the District.

If, in contrast, as a result of platting and apportionment of the Bond Assessment to the platted parcels, the Bond Assessment per ERU for land that remains unplatted equals more than $72,925.89 (for instance as a result of a smaller number of units), taking into account any future development plans for the unplatted lands – in the District's sole discretion and to the extent such future development plans are feasible, consistent with existing entitlements and governmental requirements, and reasonably expected to be implemented, then the difference in Bond Assessment plus accrued interest will be collected from the owner of the property which platting caused the increase of assessment per ERU to occur, in accordance with the assessment resolution and/or a true-up agreement to be

entered into between the District and the Developer, which will be binding on assignees.

The owner(s) of the property will be required to immediately remit to the Trustee for redemption a true-up payment equal to the difference between the actual Bond Assessment per ERU and $72,925.89, multiplied by the actual number of ERUs plus accrued interest to the next succeeding interest payment date on the Bonds, unless such interest payment date occurs within 45 days of such true-up payment, in which case the accrued interest shall be paid to the following interest payment date (or such other time as set forth in the supplemental indenture for the applicable series of Bonds secured by the Bond Assessment).

In addition to platting of property within the District, any planned sale of an unplatted parcel to another builder or developer will cause the District to initiate a true-up test as described above to test whether the amount of the Bond Assessment per ERU for land that remains unplatted within the District remains equal to $72,925.89. The test will be based upon the development rights as signified by the number of ERUs associated with such parcel that are transferred from seller to buyer. The District shall provide an estoppel or similar document to the buyer evidencing the amount of Bond Assessment transferred at sale.

5.7 Assessment Roll

Based on the per gross acre assessment proposed in Section 5.2, the Bond Assessment of $115,325,000 is proposed to be levied over the area described in Exhibit “A”. Excluding any capitalized interest period, debt service assessment may be paid in thirty (30) annual installments for each series of assessments.

6.0 Additional Stipulations

6.1 Overview

Wrathell, Hunt and Associates, LLC was retained by the District to prepare a methodology to fairly allocate the special assessments related to the District’s Capital Improvement Plan. Certain financing, development and engineering data was provided by members of District Staff and/or the Developer. The allocation Methodology described herein was based on information provided by those professionals. Wrathell, Hunt and Associates, LLC makes no representations regarding said information transactions beyond restatement of the factual information necessary for compilation of

this report. For additional information on the Bond structure and related items, please refer to the Offering Statement associated with this transaction.

Wrathell, Hunt and Associates, LLC does not represent the District as a Municipal Advisor or Securities Broker nor is Wrathell, Hunt and Associates, LLC registered to provide such services as described in Section 15B of the Securities and Exchange Act of 1934, as amended. Similarly, Wrathell, Hunt and Associates, LLC does not provide the District with financial advisory services or offer investment advice in any form.

7.0 Appendix

Table 1

Creekview

Community Development District

Development Plan

Product Type	Number of Units
Townhome	102
Single Family 40'	32
Single Family 50'	698
Single Family 60'	553
Single Family 70'	95
Total	**1480**

Table 2

Creekview

Community Development District

Project Costs

Improvement	Total Costs
Stormwater Management	$32,013,500.00
Roadway Improvements	$27,067,000.00
Water, Sewer, and Reuse Systems	$24,268,500.00
Amenities, Entry Feature, and Landscaping	$7,200,000.00
Total	**$90,549,000.00**

Table 3

Creekview

Community Development District

Preliminary Sources and Uses of Funds

Sources	
Bond Proceeds:	
Par Amount	$115,325,000.00
Total Sources	**$115,325,000.00**
Uses	
Project Fund Deposits:	
Project Fund	$90,549,000.00
Other Fund Deposits:	
Debt Service Reserve Fund	$8,378,235.72
Capitalized Interest Fund	$13,839,000.00
Delivery Date Expenses:	
Costs of Issuance	$2,556,500.00
Rounding	$2,264.28
Total Uses	**$115,325,000.00**

Table 4

Creekview

Community Development District

Benefit Allocation

Product Type	Number of Units	ERU Weight	Total ERU
Townhome	102	0.60	61.20
Single Family 40'	32	0.80	25.60
Single Family 50'	698	1.00	698.00
Single Family 60'	553	1.20	663.60
Single Family 70'	95	1.40	133.00
Total	**1480**		**1581.40**

Table 5

Creekview

Community Development District

Assessment Apportionment

Product Type	Number of Units	Total Cost Allocation*	Maximum Total Bond Assessment Apportionment	Maximum Bond Assessment Apportionment per Unit	Maximum Annual Bond Assessment Debt Service per Unit - paid in March**
Townhome	102	$3,504,235.99	$4,463,064.37	$43,755.53	$3,455.21
Single Family 40'	32	$1,465,824.21	$1,866,902.74	$58,340.71	$4,606.94
Single Family 50'	698	$39,966,613.13	$50,902,270.14	$72,925.89	$5,758.68
Single Family 60'	553	$37,996,911.85	$48,393,619.58	$87,511.07	$6,910.42
Single Family 70'	95	$7,615,414.82	$9,699,143.16	$102,096.24	$8,062.15
Total	**1480**	**$90,549,000.00**	**$115,325,000.00**		

* Please note that cost allocations to units herein are based on the ERU benefit allocation illustrated in Table 4

** Includes maximum allowable costs of collection of 4.00%, early payment discount and assumes payment in **March**

Exhibit “A”

Bond Assessment in the amount of $115,325,000 is proposed to be levied over the area as described below designating the boundary of the District:

Work Order No. 20-142.01
File No. 127B-36.00A

SURVEYOR'S DESCRIPTION

PARCEL A:
A portion of Sections 14, 15, 16 and 22, Township 5 South, Range 25 East, Clay County, Florida, being all of Parcels 1 and 2, as described and recorded in Official Records Book 4147, page 1386, of the Public Records of said county, be more particularly described as follows:

For a Point of Beginning, commence at the Southeast corner of said Section 15; thence North 00°31'29" East, along the Easterly line of said Section 15, a distance of 1620.45 feet to an angle point in the Southerly boundary line of said Parcel 2, of Official Records Book 4147, page 1386; thence South 74°45'48" West, departing said Easterly line and along said Southerly boundary line, 1639.52 feet to a point lying on the Easterly line of Exception Parcel A, as described and recorded in Official Records Book 1598, page 1299, of said Public Records; thence South 14°31'45" East, along said Easterly line and along the Easterly line of Exception Parcel C, as described and recorded in said Official Records Book 1598, page 1299, a distance of 1934.20 feet; thence Southerly continuing along said Easterly line of Exception Parcel C the following 3 courses: Course 1, thence South 28°24'51" West, 1030.00 feet; Course 2, thence South 00°57'07" West, 1500.00 feet; Course 3, thence South 06°26'53" East, 479.78 feet to the Southeasterly corner thereof, said corner lying on the Northerly right of way line of Sandridge Road (County Road No. C-739-B) (formerly State Road No. S-739-B), a variable width right of way as presently established; thence South 89°33'55" West, along said Northerly right of way line, 2396.63 feet to the Southeasterly corner of those lands described and recorded in Official Records Book 1421, page 1951, of said Public Records; thence North 00°11'40" East, departing said Northerly right of way line and along the Easterly line of said Official Records Book 1421, page 1951, a distance of 3054.55 feet to the Northeasterly corner thereof, said corner also being the Southeasterly corner of those lands described and recorded in Official Records Book 2061, page 1775, of said Public Records; thence North 01°21'22" West, along the Easterly line of said Official Records Book 2061, page 1775, a distance of 489.70 feet to the Northeasterly corner thereof, said corner also being the Southeasterly corner of Parcel 1, as described and recorded in Official Records Book 1486, page 381, of said Public Records; thence North 00°12'59" West, along the Easterly line of last said Parcel 1 and along the Easterly line of those lands described and recorded in Official Records Book 1711, page 652, of said Public Records, 694.47 feet to a point lying on said Southerly boundary line of Parcel 2, of Official Records Book 4147, page 1386; thence South 89°25'48" West, along said Southerly boundary line of Parcel 2, a distance of 1270.46 feet to a point lying on the Easterly line of Parcel "A" as described and recorded in Official Records Book 4173, page 490, of said Public Records; thence North 00°12'59" West, along said Easterly line, 448.60 feet to the Northeasterly corner thereof; thence South 88°56'50" West, along the Northerly line of said Parcel "A", and along the Northerly lines of those lands described and recorded in Official Records Book 4173, page 493 (Parcel "B"), and Official Records Book 4178, page 1821, all of said Public Records, a distance of 3902.38 feet to its intersection with the Easterly right of way line of Henley Road (County Road No. C-739) (formerly State Road No. S-739), a variable width right of way as presently established; thence Northerly along said Easterly right of way line the following 3 courses: Course 1, thence North 00°37'24" West, departing last said Northerly line, 69.82 feet; Course 2, thence North 00°18'49" West, 266.40 feet; Course 3, thence North 00°23'32" West, 776.21 feet to the Southwesterly corner of those lands described and recorded in Official Records Book 4167, page 1057, of said Public Records; thence North 88°55'54" East, departing said Easterly right of way line, along the Southerly line of said Official Records Book 4167, page 1057, and along the Southerly line of those lands described and recorded in Official Records Book 2673, page 522, of said Public Records, a distance of 3905.73 feet to the Southeasterly corner thereof, said corner also being the Southwesterly corner of those lands described and recorded in Official Records Book 2374, page 885, of said Public Records; thence North 88°59'40" East, along the Southerly line of said Official Records Book 2374, page 885, a distance of 1270.05 feet to the Southeasterly corner thereof; thence North 00°11'43" West, along the Easterly line of said Official Records Book 2374, page 885, and along the Easterly lines of those lands described and recorded in Official Records Book 2374, page 892, and Official Records Book 2859, page 403, all of said Public Records, 2749.63 feet to a point lying on the boundary line of State Road No. 23, Parcel 114, Part "A", a variable width limited access right of way as described and recorded in Official Records Book 4085, page 409, of said Public Records; thence Southeasterly along said boundary line of State Road No. 23 the following 3 courses: Course 1, thence South 89°59'29" East, departing said Easterly line of Official Records Book 2859, page 403, a distance of 1657.84 feet to the point of curvature of a curve concave Southwesterly having a radius of 2512.00 feet; Course 2, thence Southeasterly along the arc of said curve, through a central angle of 92°30'23", an arc length of 4055.73 feet to the point of tangency of said curve, said arc being subtended by a chord bearing and distance of South 43°44'17" East, 3629.35 feet; Course 3, thence South 02°30'54" West, 2354.94 feet to the Westerly corner of the Southerly terminus of said Parcel 114, Part "A", said corner lying on the Southerly line of said Section 14; thence South 89°17'09" West, along said Southerly line, 104.52 feet to the Point of Beginning.

Containing 745.05 acres, more or less.

ETM
VISION - EXPERIENCE - RESULTS
ENGLAND - THIMS & MILLER, INC.
14775 Old St. Augustine Road, Jacksonville, FL 32258
TEL: (904) 642-8990, FAX: (904) 646-9485
REG - 2584 LC - 0000316

DISTRICT LEGAL DESCRIPTION

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

CLAY COUNTY, FLORIDA

ETM NO. 17-115-07
DRAWN BY: MAJ
DATE: JULY 28 2021
PLATE 3

T:\2017\17-115\17-115-07\LandDev\Design\Plots\Exhibits\CDD\Plate 3 DISTRICT LEGAL DESCRIPTION.dwgPLOTTED: July 28, 2021 - 2:34 PM, BY: Mark Jeter

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

7E

RESOLUTION 2022-04

A RESOLUTION MAKING CERTAIN FINDINGS; AUTHORIZING AN IMPROVEMENT PLAN FOR THE MASTER ASSESSMENT AREA; ADOPTING A CAPITAL IMPROVEMENT PLAN; PROVIDING AN ESTIMATED COST OF IMPROVEMENTS; ADOPTING AN ASSESSMENT REPORT; EQUALIZING, APPROVING, CONFIRMING AND LEVYING DEBT ASSESSMENTS ON THE MASTER ASSESSMENT AREA; ADDRESSING THE FINALIZATION OF SPECIAL ASSESSMENTS; ADDRESSING THE PAYMENT OF DEBT ASSESSMENTS AND THE METHOD OF COLLECTION; PROVIDING FOR THE ALLOCATION OF DEBT ASSESSMENTS AND TRUE-UP PAYMENTS; ADDRESSING GOVERNMENT PROPERTY AND TRANSFERS OF PROPERTY TO UNITS OF LOCAL, STATE AND FEDERAL GOVERNMENT; AUTHORIZING AN ASSESSMENT NOTICE; AND PROVIDING FOR SEVERABILITY, CONFLICTS AND AN EFFECTIVE DATE.

WHEREAS, the Creekview Community Development District ("**District**") is a local unit of special-purpose government established by ordinance of the Board of County Commissioners of Clay County, Florida, and existing under and pursuant to the Uniform Community Development District Act of 1980, Chapter 190, *Florida Statutes,* as amended ("**Act**"); and

WHEREAS, the District has previously indicated its intention to construct certain types of improvements and to finance such improvements through the issuance of bonds, notes or other specific financing mechanisms, which bonds, notes or other specific financing mechanisms would be repaid by the imposition of special assessments on benefited property within the District; and

WHEREAS, the District's Board of Supervisors ("**Board**") has noticed and conducted a public hearing pursuant to Chapters 170, 190 and 197, *Florida Statutes*, relating to the imposition, levy, collection and enforcement of such assessments, and now desires to adopt a resolution imposing and levying such assessments as set forth herein.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT AS FOLLOWS:

1. **AUTHORITY.** This Resolution is adopted pursuant to Chapters 170, 190 and 197, *Florida Statutes*, including without limitation, Section 170.08, *Florida Statutes*. The recitals stated above are incorporated herein; are adopted by the Board as true and correct statements; and are further declared to be findings made and determined by the Board.

2. **FINDINGS.** The Board further finds and determines as follows:

The Capital Improvement Plan

a. The District is authorized by Chapter 190, *Florida Statutes*, to finance, fund, plan, establish, acquire, install, equip, operate, extend, construct, or reconstruct roadways, sewer and water distribution systems, stormwater management/earthwork improvements, landscape, irrigation and entry features, conservation and mitigation, street lighting and other infrastructure projects and services necessitated by the

development of, and serving lands within, the District; and

b. On August 27, 2021, and pursuant to Section 170.03, *Florida Statutes*, among other laws, the Board adopted Resolution 2021-30 ("**Declaring Resolution**"), and in doing so determined to undertake, install, plan, establish, construct or reconstruct, enlarge or extend, equip, acquire, operate, and/or maintain the infrastructure improvements described in the District's *Creekview Community Development District Capital Improvement Plan,* dated August 26, 2021*,* attached hereto as **Exhibit A** and incorporated herein by reference ("**Capital Improvement Plan**," and the project described therein, the "**Project**"); and

c. The plans and specifications for the Project are on file in the offices of the District Manager at c/o Wrathell, Hunt and Associates, LLC, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431 ("**District Records Office**"); and

The Debt Assessment Process

d. Also as part of the Declaring Resolution, the Board expressed an intention to issue bonds, notes or other specific financing mechanisms to provide a portion of the funds needed for the Project, and further declared its intention to defray the whole or any part of the expense of the Project by levying special assessments ("**Debt Assessments**") on specially benefited property within all of the District (i.e., "**Master Assessment Area**"); and

e. The Declaring Resolution was adopted in compliance with the requirements of Section 170.03, *Florida Statutes*, and prior to the time it was adopted, the requirements of Section 170.04, *Florida Statutes*, had been met; and

f. As directed by the Declaring Resolution, said Declaring Resolution was published as required by Section 170.05, *Florida Statutes*, and a copy of the publisher's affidavit of publication is on file with the Secretary of the District; and

g. As directed by the Declaring Resolution, the Board caused to be made a preliminary assessment roll as required by Section 170.06, *Florida Statutes*; and

h. As required by Section 170.07, *Florida Statutes*, and as part of the Declaring Resolution, the Board fixed the time and place of a public hearing at which owners of the property to be assessed and other persons interested therein could appear before the Board and be heard as to (i) the propriety and advisability of making the improvements, (ii) the cost thereof, (iii) the manner of payment therefore, and (iv) the amount thereof to be assessed against each specially benefited property or parcel, and the Board further authorized publication of notice of such public hearing and individual mailed notice of such public hearing in accordance with Chapters 170, 190, and 197, *Florida Statutes*; and

i. Notice of the scheduled public hearing was given by publication and also by mail as required by Sections 170.07 and 197.3632, *Florida Statutes*, and affidavits as to such publication and mailings are on file in the office of the Secretary of the District; and

j. On October 26, 2021, and at the time and location specified in the Declaring Resolution,

the Board conducted such public hearing by communications media technology and heard and considered all complaints and testimony as to the matters described above; the Board further met as an "Equalization Board;" and the Board has made such modifications in the preliminary assessment roll as it deems necessary, just and right in the making of the final assessment roll; and

Equalization Board Additional Findings

k. Having considered the estimated costs of the Project, the estimated financing costs and all comments and evidence presented at such public hearing, the Board further finds and determines that:

   i. It is necessary to the public health, safety and welfare and in the best interests of the District that: (1) the District provide the Project as set forth in the Capital Improvement Plan; (2) the cost of such Project be assessed against the lands specially benefited by such Project, and within the Master Assessment Area; and (3) the District issue bonds, notes or other specific financing mechanisms to provide funds for such purposes pending the receipt of such Debt Assessments; and

   ii. The provision of said Project, the levying of the Debt Assessments, and the sale and issuance of such bonds, notes, or other specific financing mechanisms serve a proper, essential, and valid public purpose and are in the best interests of the District, its landowners and residents; and

   iii. The estimated costs of the Project are as specified in the Capital Improvement Plan and Assessment Report (defined below), and the amount of such costs is reasonable and proper; and

   iv. It is reasonable, proper, just and right to assess the cost of such Project against the properties specially benefited thereby in the Master Assessment Area, using the method determined by the Board and set forth in the *Master Special Assessment Methodology Report,* dated August 23, 2021 ("**Assessment Report**," attached hereto as **Exhibit B** and incorporated herein by this reference), which results in the Debt Assessments set forth on the final assessment roll; and

   v. The Project benefits all developable property within the Master Assessment Area; and

   vi. Accordingly, the Debt Assessments as set forth in the Assessment Report constitute a special benefit to all parcels of real property listed on said final assessment roll, and the benefit, in the case of each such parcel, will be equal to or in excess of the Debt Assessments imposed thereon, as set forth in **Exhibit B**; and

   vii. All developable property within the Master Assessment Area is deemed to be benefited by the Project, and the Debt Assessments will be allocated in accordance with the Assessment Report at **Exhibit B**; and

viii. The Debt Assessments are fairly and reasonably allocated across the benefitted property, as set forth in **Exhibit B**; and

ix. It is in the best interests of the District that the Debt Assessments be paid and collected as herein provided; and

x. In order to provide funds with which to pay the costs of the Project which are to be assessed against the benefited properties, pending the collection of the Debt Assessments, it is necessary for the District to issue revenue bonds, notes or other specific financing mechanisms, including refunding bonds (together, "**Bonds**").

3. **AUTHORIZATION FOR PROJECT; ADOPTION OF CAPITAL IMPROVEMENT PLAN.** The Capital Improvement Plan identifies and describes the infrastructure improvements to be financed in part with the Bonds, and sets forth the costs of the Project. The District hereby confirms that the Project serves a proper, essential, and valid public purpose. The use of the Capital Improvement Plan in connection with the sale of the Bonds is hereby authorized, approved and ratified, and the proper officers, employees and/or agents of the District are hereby authorized and directed to take such further action as may be necessary or desirable to cause the same to be made.

4. **ESTIMATED COST OF IMPROVEMENTS.** The total estimated costs of the Project and the costs to be paid by the Debt Assessments on all specially benefited property are set forth in **Exhibits A and B**, respectively, hereto.

5. **ADOPTION OF ASSESSMENT REPORT.** The Assessment Report setting forth the allocation of Debt Assessments to the benefitted lands within the Master Assessment Area is hereby approved, adopted, and confirmed. The District ratifies its use in connection with the sale of the Bonds.

6. **EQUALIZATION, APPROVAL, CONFIRMATION AND LEVY OF DEBT ASSESSMENTS.** The Debt Assessments imposed on the parcels specially benefited by the Project within the Master Assessment Area, all as specified in the final assessment roll set forth in **Exhibit B**, attached hereto, are hereby equalized, approved, confirmed and levied. Immediately following the adoption of this Resolution, the lien of Debt Assessments as reflected in **Exhibit B**, attached hereto, shall be recorded by the Secretary of the District in the District's "**Improvement Lien Book**." The Debt Assessments against each respective parcel shown on such final assessment roll and interest, costs, and penalties thereon, as hereafter provided, shall be and shall remain a legal, valid and binding first lien on such parcel, coequal with the lien of all state, county, district, municipal or other governmental taxes and superior in dignity to all other liens, titles, and claims.

a. ***Supplemental Assessment Resolutions for Bonds.*** The lien for the Debt Assessments established hereunder shall be inchoate until the District issues Bonds. In connection with the issuance of any particular series of the Bonds, the District may adopt, without the need for further public hearing, a supplemental assessment resolution establishing specific Debt Assessments, in one or more separately enforceable Debt Assessment liens, securing such Bonds. Such subsequent resolutions shall be adopted at a noticed meeting of the District, and shall set forth the actual amounts financed, costs of issuance, expected costs of collection, and the total amount of the assessments pledged to that issue, which

amount shall be consistent with the lien imposed by this Resolution. Among other things, the supplemental assessment resolutions may provide for the issuance of multiple series of Bonds each secured by one or more different assessment areas within the Master Assessment Area.

b. ***Adjustments to Debt Assessments.*** The District may, by subsequent resolution, adjust the acreage assigned to particular parcel identification numbers listed on the final assessment roll to reflect accurate apportionment of acreage amongst individual parcel identification numbers. The District may make any other such acreage and boundary adjustments to parcels listed on the final assessment roll as may be necessary and in the best interests of the District, as determined by the Board by subsequent resolution. Any such adjustment in the assessment roll shall be consistent with the requirements of law.

c. ***Impact Fee Credits.*** The District may or may not be entitled to impact fee credits as a result of the development of the Project, based on applicable laws and/or agreements governing impact fee credits. Unless otherwise addressed by supplemental assessment resolution, the proceeds from any impact fee credits received may be used in the District's sole discretion as an offset for any acquisition of any portion of the Project, for completion of the Project, or otherwise used against the outstanding indebtedness of any debt issuance that funded the improvement giving rise to the credits.

7. **FINALIZATION OF DEBT ASSESSMENTS.** When a project has been constructed or otherwise provided to the satisfaction of the Board, the Board shall adopt a resolution accepting the same and determining the actual costs (including financing costs) thereof, as required by Sections 170.08 and 170.09, *Florida Statutes*. Pursuant to Section 170.08, *Florida Statutes*, the District shall credit to each Debt Assessment the difference, if any, between the Debt Assessment as hereby made, approved and confirmed and the actual costs incurred in completing the applicable project. In making such credits, no credit shall be given for bond, note or other specific financing mechanism costs, capitalized interest, funded reserves or bond or other discounts. Such credits, if any, shall be entered in the Improvement Lien Book.

8. **PAYMENT OF DEBT ASSESSMENTS AND METHOD OF COLLECTION.**

a. ***Payment.*** The Debt Assessments, as further set forth in each supplemental assessment resolution, and securing the issuance of each series of the Bonds, may be paid in not more than thirty (30) yearly installments of principal and interest – beginning upon the issuance of the particular series of the Bonds (and after taking into account any capitalized interest periods), provided, however, that the Board shall at any time make such adjustments by resolution, and at a noticed meeting of the Board, to that payment schedule as may be necessary and in the best interests of the District to account for changes in long and short term debt as actually issued by the District.

b. ***Prepayment.*** Subject to the provisions of any supplemental assessment resolution, any owner of property subject to the Debt Assessments may, at its option, pre-pay the entire amount of the Debt Assessment any time, or a portion of the amount of the Debt Assessment up to two times, plus accrued interest to the next succeeding interest payment date (or the second succeeding interest payment date if such prepayment is made within forty-five (45) calendar days before an interest payment date (or such other

time as set forth in the supplemental indenture for the applicable series of bonds secured by the Debt Assessments in question), attributable to the property subject to Debt Assessments owned by such owner. Prepayment of Debt Assessments does not entitle the property owner to any discounts for early payment. If authorized by a supplemental assessment resolution, the District may grant a discount equal to all or a part of the payee's proportionate share of the cost of the Project consisting of bond financing costs, such as capitalized interest, funded reserves, and bond discount included in the estimated cost of the Project, upon payment in full of any Debt Assessment during such period prior to the time such financing costs are incurred as may be specified by the District.

c. ***Uniform Method; Alternatives.*** The District may elect to use the method of collecting Debt Assessments authorized by Sections 197.3632 and 197.3635, *Florida Statutes* ("**Uniform Method**"). The District has heretofore taken all required actions to comply with Sections 197.3632 and 197.3635, *Florida Statutes*. Such Debt Assessments may be subject to all of the collection provisions of Chapter 197, *Florida Statutes*. Notwithstanding the above, in the event the Uniform Method of collecting its Debt Assessments is not available to the District in any year, or if determined by the District to be in its best interests, and subject to the terms of any applicable trust indenture, the Debt Assessments may be collected as is otherwise permitted by law. In particular, the District may, in its sole discretion, collect Debt Assessments by directly billing landowners and enforcing said collection in any manner authorized by law. Any prejudgment interest on delinquent assessments that are directly billed shall accrue at the applicable rate of any bonds or other debt instruments secured by the Debt Assessments. The decision to collect Debt Assessments by any particular method – e.g., on the tax roll or by direct bill – does not mean that such method will be used to collect Debt Assessments in future years, and the District reserves the right in its sole discretion to select collection methods in any given year, regardless of past practices.

d. ***Uniform Method Agreements Authorized.*** For each year the District uses the Uniform Method, the District shall enter into an agreement with the County Tax Collector who may notify each owner of a lot or parcel within the District of the amount of the special assessment, including interest thereon, in the manner provided in Section 197.3635, *Florida Statutes*.

e. ***Re-amortization.*** Any particular lien of the Debt Assessments shall be subject to re-amortization where the applicable series of Bonds is subject to re-amortization pursuant to the applicable trust indenture and where the context allows.

9. ALLOCATION OF DEBT ASSESSMENTS; APPLICATION OF TRUE-UP PAYMENTS.

a. At such time as parcels of land, or portions thereof, are included in a plat or site plan, it shall be an express condition of the lien established by this Resolution that, prior to County approval, any and all plats or site plans for any portion of the lands within the District, as the District's boundaries may be amended from time to time, shall be presented to the District Manager for review. As parcels of land, or portions thereof, are included in a plat or site plan, the District Manager shall review the plat or site plan and cause the Debt Assessments securing each series of Bonds to be reallocated to the units being included in the plat or site plan and the remaining property in accordance with

Exhibit B, and cause such reallocation to be recorded in the District's Improvement Lien Book.

b. Pursuant to the Assessment Report, attached hereto as Exhibit B, and which terms are incorporated herein, there may be required from time to time certain true-up payments. When a plat or site plan is presented to the District, the District Manager shall review the plat or site plan to determine whether, taking into account the plat or site plan, there is a net shortfall in the overall principal amount of assessments reasonably able to be assigned to benefitted lands within the Master Assessment Area. Such determination shall be made based on the language in this Resolution and/or the tests or other methods set forth in Exhibit B (if any), or any tests or methods set forth in a supplemental assessment resolution and corresponding assessment report. If the overall principal amount of assessments reasonably cannot be assigned, or is not reasonably expected to be assigned, as set forth in more detail in and subject to the terms of Exhibit B (or any supplemental resolution and report, as applicable), to the platted and site planned lands as well as the undeveloped lands, then a debt reduction payment ("True-Up Payment") in the amount of such shortfall shall become due and payable that tax year by the landowner(s) of record of the land subject to the proposed plat or site plan and of the remaining undeveloped lands, in addition to any regular assessment installment. The District's review shall be limited solely to this function and the enforcement of the lien established by this Resolution. In the event a True-Up Payment is due and unpaid, the lien established herein for the True-Up Payment amount shall remain in place until such time as the True-Up Payment is made. The District shall record all True-Up Payments in its Improvement Lien Book.

c. In connection with any true-up determination, affected landowner(s) may request that such true-up determination be deferred because the remaining undeveloped lands are able to support the development of all of the originally planned units within the Master Assessment Area. To support the request, the affected landowner(s) shall provide the following evidence for the District's consideration: a) proof of the amount of entitlements remaining on the undeveloped lands within the Master Assessment Area, b) a revised overall development plan showing the number and type of units reasonably planned for the remainder of the development, c) evidence of allowable zoning conditions that would enable those entitlements to be placed in accordance with the revised development plan, and d) documentation prepared by a licensed engineer that shows the feasibility of implementing the proposed development plan. Any deferment shall be in the District's reasonable discretion.

d. The foregoing is based on the District's understanding that the community would be developed with the type and number of units set forth in Exhibit B, on the developable acres. However, more than the stated number of units may be developed. In no event shall the District collect Debt Assessments pursuant to this Resolution in excess of the total debt service related to the Project, including all costs of financing and interest. The District recognizes that such things as regulatory requirements and market conditions may affect the timing and scope of the development in the District. If the strict application of the true-up methodology to any assessment reallocation pursuant to this paragraph would result in Debt Assessments collected in excess of the District's total debt service obligations for the Project, the Board shall by resolution take appropriate action to

equitably reallocate the Debt Assessments.

e. As set forth in any supplemental assessment resolution and/or supplemental assessment report for a specific series of Bonds, the District may assign a specific debt service assessment lien comprising a portion of the Debt Assessments to an assessment area comprised of specific unplatted lands which are less than all of the unplatted lands in the Master Assessment Area, and, accordingly, any related true-up determinations may be limited to determining whether the planned units for such specified lands in the assessment area have been and/or will be developed.

10. GOVERNMENT PROPERTY; TRANSFERS OF PROPERTY TO UNITS OF LOCAL, STATE, AND FEDERAL GOVERNMENT. Real property owned by units of local, state, and federal governments, or similarly exempt entities, shall not be subject to the Debt Assessments without specific consent thereto. If at any time, any real property on which Debt Assessments are imposed by this Resolution is sold or otherwise transferred to a unit of local, state, or federal government (without consent of such governmental unit to the imposition of Debt Assessments thereon), or similarly exempt entity, all future unpaid Debt Assessments for such tax parcel shall become due and payable immediately prior to such transfer without any further action of the District.

11. ASSESSMENT NOTICE. The District's Secretary is hereby directed to record a general Notice of Assessments in the Official Records of Clay County, Florida, which shall be updated from time to time in a manner consistent with changes in the boundaries of the District.

12. SEVERABILITY. If any section or part of a section of this Resolution is declared invalid or unconstitutional, the validity, force and effect of any other section or part of a section of this Resolution shall not thereby be affected or impaired unless it clearly appears that such other section or part of a section of this Resolution is wholly or necessarily dependent upon the section or part of a section so held to be invalid or unconstitutional.

13. CONFLICTS. All resolutions or parts thereof in conflict herewith are, to the extent of such conflict, superseded and repealed.

14. EFFECTIVE DATE. This Resolution shall become effective upon its adoption.

APPROVED AND ADOPTED THIS 26TH DAY OF OCTOBER, 2021.

ATTEST: **CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT**

_____ _____

Secretary/Assistant Secretary Chair/ Vice Chair, Board of Supervisors

Exhibit A: *Creekview Community Development District Capital Improvement Plan, dated August 26, 2021*

Exhibit B: *Master Special Assessment Methodology Report, dated August 23, 2021*

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

8A

PUBLISHER AFFIDAVIT
CLAY TODAY
Published Weekly
Orange Park, Florida

STATE OF FLORIDA
COUNTY OF CLAY:

Before the undersigned authority personally appeared Jon Cantrell, who on oath says that he is the publisher of the "Clay Today" a newspaper published weekly at Orange Park in Clay County, Florida; that the attached copy of advertisement being a

NOTICE OF PUBLIC HEARING

in the matter of

2021/2022 BUDGET

LEGAL: 48453 ORDER: 329261

was published in said newspaper in the issues:

09/30/2021
10/07/2021

Affiant further says that said "Clay Today" is a newspaper published at Orange Park, in said Clay County, Florida, and that the said newspaper has heretofore been continuously published in said Clay County, Florida, weekly, and has been entered as Periodical material matter at the post office in Orange Park, in said Clay County, Florida, for period of one year next proceeding the first publication of the attached copy of advertisement; and affiant further says that he has neither paid nor promised any person, firm or corporation any discount, rebate, commission or refund for the purpose of securing this advertisement for publication in the said newspaper.

Sworn to me and subscribed before me 10/07/2021.

NOTARY PUBLIC, STATE OF FLORIDA

NOTARY PUBLIC STATE OF FLORIDA
CHRISTIE LOU WAYNE
MY COMMISSION # HH34426
EXPIRES: September 20, 2024

3515 US HWY 17 Suite A, Fleming Island FL 32003
Telephone (904) 264-3200 - FAX (904) 264-3285
E-Mail: Christie@opcfla.com

NOTICE OF PUBLIC HEARING
TO CONSIDER THE ADOPTION OF THE FISCAL YEAR 2020/2021 AND THE FISCAL YEAR 2021/2022 BUDGETS; AND NOTICE OF REGULAR BOARD OF SUPERVISORS' MEETING.
CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

The Board of Supervisors ("Board") of the Creekview Community Development District ("District") will hold public hearings on **October 26, 2021, at 9:30 a.m., at the offices of Carlton Construction, Inc., 4615 U.S. Highway 17, Suite 1, Fleming Island, Florida 32003**, for the purpose of hearing comments and objections on the adoption of the proposed budgets ("Proposed Budgets") of the District for the remainder of the fiscal year ending September 30, 2021 ("Fiscal Year 2010/2021") and the fiscal year beginning October 1, 2021 and ending September 30, 2022 ("Fiscal Year 2021/2022"). A regular board meeting of the District will also be held at that time where the Board may consider any other business that may properly come before it.

A copy of the agenda and Proposed Budgets may be obtained by contacting the offices of the District Manager, Wrathell Hunt & Associates, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431, (877) 276-0889 ("District Manager's Office"), during normal business hours.

The public hearings and meeting are open to the public and will be conducted in accordance with the provisions of Florida law. The public hearings and meeting may be continued to a date, time, and place to be specified on the record at the public hearings or meeting.

Any person requiring special accommodations at this meeting and/or public hearings or requiring assistance connecting to any communications media technology because of a disability or physical impairment should contact the District Manager's Office at least forty-eight (48) hours prior to the meeting and public hearing. If you are hearing or speech impaired, please contact the Florida Relay Service by dialing 7-1-1, or 1-800-955-8771 (TTY) / 1-800-955-8770 (Voice), for aid in contacting the District Manager's Office.

Any person who decides to appeal any decision made by the Board with respect to any matter considered at the public hearing or meeting is advised that person will need a record of proceedings and that accordingly, the person may need to ensure that a verbatim record of the proceedings is made, including the testimony and evidence upon which such appeal is to be based.

Craig Wrathell
District Manager

Legal 48453 published Sept 30 and Oct 7, 2021 in Clay County's Clay Today newspaper

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

8B

RESOLUTION 2022-05

THE ANNUAL APPROPRIATION RESOLUTION OF CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT ("DISTRICT") RELATING TO THE ANNUAL APPROPRIATIONS AND ADOPTING THE BUDGET FOR THE REMAINDER OF THE FISCAL YEAR BEGINNING OCTOBER 1, 2020 AND ENDING SEPTEMBER 30, 2021; AUTHORIZING BUDGET AMENDMENTS; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, Creekview Community Development District ("**District**") was recently established by an ordinance of the Board of County Commissioners of Clay County, Florida on June 22, 2021, and effective as of June 29, 2021; and

WHEREAS, the District Manager has submitted to the Board of Supervisors ("**Board**") of the District proposed budget ("**Proposed Budget**") for the remainder of the fiscal year beginning October 1, 2020, and ending September 30, 2021 ("**Fiscal Year 2020/2021**") along with an explanatory and complete financial plan for each fund of the District, pursuant to the provisions of Section 190.008(2)(a), *Florida Statute*s; and

WHEREAS, as soon as practical and recognizing the establishment date of the District, the District filed a copy of the Proposed Budget with the local governing authorities having jurisdiction over the area included in the District pursuant to the provisions of Section 190.008(2)(b), *Florida Statutes*; and

WHEREAS, the Board set a public hearing thereon and caused notice of such public hearing to be given by publication pursuant to Section 190.008(2)(a), *Florida Statutes*; and

WHEREAS, Section 190.008(2)(a), *Florida Statutes*, requires that the Board, by passage of the Annual Appropriation Resolution, shall adopt a budget for the ensuing fiscal year and appropriate such sums of money as the Board deems necessary to defray all expenditures of the District during the ensuing fiscal year; and

WHEREAS, the District Manager has prepared the Proposed Budget, whereby the budget shall project the cash receipts and disbursements anticipated during a given time period, including reserves for contingencies for emergency or other unanticipated expenditures during the fiscal years.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT:

SECTION 1. BUDGET

a. The Board has reviewed the Proposed Budget, a copy of which is on file with the office of the District Manager and at the District's Local Records Office, and hereby approves certain amendments thereto, as shown in Section 2 below.

b. The Proposed Budget, attached hereto as **Exhibit A,** as amended by the Board, is hereby adopted in accordance with the provisions of Section 190.008(2)(a), *Florida Statutes* (**"Adopted Budget"**), and incorporated herein by reference; provided, however, that the comparative figures contained in the Adopted Budget may be subsequently revised as deemed necessary by the District Manager to reflect actual revenues and expenditures.

c. The Adopted Budget, as amended, shall be maintained in the office of the District Manager and at the District's Local Records Office and identified as "The Budget for the Creekview Community Development District for the Fiscal Year Ending September 30, 2021."

d. The Adopted Budget shall be posted by the District Manager on the District's official website within thirty (30) days after adoption and shall remain on the website for at least 2 years.

SECTION 2. APPROPRIATIONS

There is hereby appropriated out of the revenues of the District, for Fiscal Year 2020/2021, the sum of $48,281 to be raised by the levy of assessments and/or otherwise, which sum is deemed by the Board to be necessary to defray all expenditures of the District during said budget year, to be divided and appropriated in the following fashion:

TOTAL GENERAL FUND	$48,281
TOTAL ALL FUNDS	$48,281

SECTION 3. BUDGET AMENDMENTS

Pursuant to Section 189.016, *Florida Statutes*, the District at any time within Fiscal Year 2020/2021 or within 60 days following the end of the Fiscal Year 2020/2021 may amend its Adopted Budget for that fiscal year as follows:

a. The Board may authorize an increase or decrease in line-item appropriations within a fund by motion recorded in the minutes if the total appropriations of the fund do not increase.

b. The District Manager or Treasurer may authorize an increase or decrease in line-item appropriations within a fund if the total appropriations of the fund do not increase and if the aggregate change in the original appropriation item does not exceed $10,000 or 10% of the original appropriation.

c. By resolution, the Board may increase any appropriation item and/or fund to reflect receipt of any additional unbudgeted monies and make the corresponding change to appropriations or the unappropriated balance.

d. Any other budget amendments shall be adopted by resolution and consistent with Florida law.

The District Manager or Treasurer must establish administrative procedures to ensure that any budget amendments are in compliance with this Section 3 and Section 189.016, *Florida Statutes*, among other applicable laws. Among other procedures, the District Manager or Treasurer must ensure that any amendments to budget under subparagraphs c. and d. above are posted on the District's website within 5 days after adoption and remain on the website for at least 2 years.

SECTION 4. EFFECTIVE DATE. This Resolution shall take effect immediately upon adoption.

PASSED AND ADOPTED this 26th Day of October, 2021.

ATTEST:

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

_____
Secretary/Assistant Secretary

_____
Chair/Vice Chair, Board of Supervisors

Exhibit A: Fiscal Year 2020/2021 Budget

Exhibit A

Fiscal Year 2020/2021 Budget

CREEKVIEW
COMMUNITY DEVELOPMENT DISTRICT
PROPOSED BUDGET
FISCAL YEAR 2021

CREEKVIEW
COMMUNITY DEVELOPMENT DISTRICT
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CREEKVIEW
COMMUNITY DEVELOPMENT DISTRICT
GENERAL FUND BUDGET
FISCAL YEAR 2021

	Proposed Budget FY 2021
REVENUES	
Landowner contribution	48,281
Total revenues	48,281
EXPENDITURES	
Professional & administrative	
Supervisors	2,000
Management/accounting/recording	7,500
Legal	25,000
Engineering	1,500
Audit*	-
Arbitrage rebate calculation*	-
Dissemination agent*	-
Trustee*	-
Telephone	33
Postage	350
Printing & binding	83
Legal advertising	6,500
Annual special district fee	175
Insurance	2,750
Contingencies/bank charges	500
Website hosting & maintenance	1,680
Website ADA compliance	210
Total expenditures	48,281
Excess/(deficiency) of revenues over/(under) expenditures	-
Fund balance - beginning (unaudited)	-
Fund balance - ending	$ -

* These items will be realized when bonds are issued

CREEKVIEW
COMMUNITY DEVELOPMENT DISTRICT
DEFINITIONS OF GENERAL FUND EXPENDITURES

EXPENDITURES	FY 2021
Professional & administrative	
Supervisors	$ 2,000
Statutorily set at $200 for each meeting of the Board of Supervisors not to exceed $4,800 for each fiscal year.	
Management/accounting/recording	7,500
Wrathell, Hunt and Associates, LLC (WHA), specializes in managing community development districts by combining the knowledge, skills and experience of a team of professionals to ensure compliance with all of the District's governmental requirements. WHA develops financing programs, administers the issuance of tax exempt bond financings, operates and maintains the assets of the community.	
Legal	25,000
General counsel and legal representation, which includes issues relating to public finance, public bidding, rulemaking, open meetings, public records, real property dedications, conveyances and contracts.	
Engineering	1,500
The District's Engineer will provide construction and consulting services, to assist the District in crafting sustainable solutions to address the long term interests of the community while recognizing the needs of government, the environment and maintenance of the District's facilities.	
Audit	-
Statutorily required for the District to undertake an independent examination of its books, records and accounting procedures.	
Arbitrage rebate calculation*	-
To ensure the District's compliance with all tax regulations, annual computations are necessary to calculate the arbitrage rebate liability.	
Dissemination agent*	-
The District must annually disseminate financial information in order to comply with the requirements of Rule 15c2-12 under the Securities Exchange Act of 1934. Wrathell, Hunt & Associates serves as dissemination agent.	
Telephone	33
Telephone and fax machine.	
Postage	350
Mailing of agenda packages, overnight deliveries, correspondence, etc.	
Printing & binding	83
Letterhead, envelopes, copies, agenda packages	
Legal advertising	6,500
The District advertises for monthly meetings, special meetings, public hearings, public bids, etc.	
Annual special district fee	175
Annual fee paid to the Florida Department of Economic Opportunity.	
Insurance	2,750
The District will obtain public officials and general liability insurance.	
Contingencies/bank charges	500
Bank charges and other miscellaneous expenses incurred during the year and automated AP routing etc.	
Website hosting & maintenance	1,680
Website ADA compliance	210
Total expenditures	$ 48,281

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

9A

PUBLISHER AFFIDAVIT
CLAY TODAY
Published Weekly
Orange Park, Florida

STATE OF FLORIDA
COUNTY OF CLAY:

Before the undersigned authority personally appeared Jon Cantrell, who on oath says that he is the publisher of the "Clay Today" a newspaper published weekly at Orange Park in Clay County, Florida; that the attached copy of advertisement being a

NOTICE OF PUBLIC HEARING

in the matter of

2021/2022 BUDGET

LEGAL: 48453 ORDER: 329261

was published in said newspaper in the issues:

09/30/2021
10/07/2021

Affiant further says that said "Clay Today" is a newspaper published at Orange Park, in said Clay County, Florida, and that the said newspaper has heretofore been continuously published in said Clay County, Florida, weekly, and has been entered as Periodical material matter at the post office in Orange Park, in said Clay County, Florida, for period of one year next proceeding the first publication of the attached copy of advertisement; and affiant further says that he has neither paid nor promised any person, firm or corporation any discount, rebate, commission or refund for the purpose of securing this advertisement for publication in the said newspaper.

Sworn to me and subscribed before me 10/07/2021.

NOTARY PUBLIC, STATE OF FLORIDA

NOTARY PUBLIC STATE OF FLORIDA
CHRISTIE LOU WAYNE
MY COMMISSION # HH34426
EXPIRES: September 20, 2024

3515 US HWY 17 Suite A, Fleming Island FL 32003
Telephone (904) 264-3200 - FAX (904) 264-3285
E-Mail: Christie@opcfla.com

NOTICE OF PUBLIC HEARING
TO CONSIDER THE ADOPTION OF THE FISCAL YEAR 2020/2021 AND THE FISCAL YEAR 2021/2022 BUDGETS; AND NOTICE OF REGULAR BOARD OF SUPERVISORS' MEETING.
CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

The Board of Supervisors ("Board") of the Creekview Community Development District ("District") will hold public hearings on **October 26, 2021, at 9:30 a.m., at the offices of Carlton Construction, Inc., 4615 U.S. Highway 17, Suite 1, Fleming Island, Florida 32003**, for the purpose of hearing comments and objections on the adoption of the proposed budgets ("Proposed Budgets") of the District for the remainder of the fiscal year ending September 30, 2021 ("Fiscal Year 2010/2021") and the fiscal year beginning October 1, 2021 and ending September 30, 2022 ("Fiscal Year 2021/2022"). A regular board meeting of the District will also be held at that time where the Board may consider any other business that may properly come before it.

A copy of the agenda and Proposed Budgets may be obtained by contacting the offices of the District Manager, Wrathell Hunt & Associates, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431, (877) 276-0889 ("District Manager's Office"), during normal business hours.

The public hearings and meeting are open to the public and will be conducted in accordance with the provisions of Florida law. The public hearings and meeting may be continued to a date, time, and place to be specified on the record at the public hearings or meeting.

Any person requiring special accommodations at this meeting and/or public hearings or requiring assistance connecting to any communications media technology because of a disability or physical impairment should contact the District Manager's Office at least forty-eight (48) hours prior to the meeting and public hearing. If you are hearing or speech impaired, please contact the Florida Relay Service by dialing 7-1-1, or 1-800-955-8771 (TTY) / 1-800-955-8770 (Voice), for aid in contacting the District Manager's Office.

Any person who decides to appeal any decision made by the Board with respect to any matter considered at the public hearing or meeting is advised that person will need a record of proceedings and that accordingly, the person may need to ensure that a verbatim record of the proceedings is made, including the testimony and evidence upon which such appeal is to be based.

Craig Wrathell
District Manager

Legal 48453 published Sept 30 and Oct 7, 2021 in Clay County's Clay Today newspaper

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

9B

RESOLUTION 2022-06

THE ANNUAL APPROPRIATION RESOLUTION OF CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT ("DISTRICT") RELATING TO THE ANNUAL APPROPRIATIONS AND ADOPTING THE BUDGET FOR THE FISCAL YEAR BEGINNING OCTOBER 1, 2021 AND ENDING SEPTEMBER 30, 2022; AUTHORIZING BUDGET AMENDMENTS; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, Creekview Community Development District ("**District**") was recently established by an ordinance of the Board of County Commissioners of Clay County, Florida on June 22, 2021, and effective as of June 29, 2021; and

WHEREAS, the District Manager has submitted to the Board of Supervisors ("**Board**") of the District a proposed budget ("**Proposed Budget**") for the fiscal year beginning October 1, 2021 and ending September 30, 2022 ("**Fiscal Year 2021/2022**") along with an explanatory and complete financial plan for each fund of the District, pursuant to the provisions of Section 190.008(2)(a), *Florida Statute*s; and

WHEREAS, as soon as practical and recognizing the establishment date of the District, the District filed a copy of the Proposed Budget with the local governing authorities having jurisdiction over the area included in the District pursuant to the provisions of Section 190.008(2)(b), *Florida Statutes*; and

WHEREAS, the Board set a public hearing thereon and caused notice of such public hearing to be given by publication pursuant to Section 190.008(2)(a), *Florida Statutes*; and

WHEREAS, Section 190.008(2)(a), *Florida Statutes*, requires that the Board, by passage of the Annual Appropriation Resolution, shall adopt a budget for the ensuing fiscal year and appropriate such sums of money as the Board deems necessary to defray all expenditures of the District during the ensuing fiscal year; and

WHEREAS, the District Manager has prepared the Proposed Budget, whereby the budget shall project the cash receipts and disbursements anticipated during a given time period, including reserves for contingencies for emergency or other unanticipated expenditures during the fiscal years.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT:

SECTION 1. BUDGET

a. The Board has reviewed the Proposed Budget, a copy of which is on file with the office of the District Manager and at the District's Local Records Office, and hereby approves certain amendments thereto, as shown in Section 2 below.

b. The Proposed Budget, attached hereto as **Exhibit A,** as amended by the Board, is hereby adopted in accordance with the provisions of Section 190.008(2)(a), *Florida Statutes* (**"Adopted Budgets"**), and incorporated herein by reference; provided, however, that the comparative figures contained in the Adopted Budget may be subsequently revised as deemed necessary by the District Manager to reflect actual revenues and expenditures.

c. The Adopted Budget, as amended, shall be maintained in the office of the District Manager and at the District's Local Records Office and identified as "The Budget for the Creekview Community Development District for the Fiscal Year Ending September 30, 2022."

d. The Adopted Budges shall be posted by the District Manager on the District's official website within thirty (30) days after adoption and shall remain on the website for at least 2 years.

SECTION 2. APPROPRIATIONS

There is hereby appropriated out of the revenues of the District, for Fiscal Year 2021/2022, the sum of $105,290 to be raised by the levy of assessments and/or otherwise, which sum is deemed by the Board to be necessary to defray all expenditures of the District during said budget year, to be divided and appropriated in the following fashion:

TOTAL GENERAL FUND	$105,290
TOTAL ALL FUNDS	$105,290

SECTION 3. BUDGET AMENDMENTS

Pursuant to Section 189.016, *Florida Statutes*, the District at any time within Fiscal Year 2021/2022 or within 60 days following the end of the Fiscal Year 2021/2022 may amend its Adopted Budget for that fiscal year as follows:

a. The Board may authorize an increase or decrease in line-item appropriations within a fund by motion recorded in the minutes if the total appropriations of the fund do not increase.

b. The District Manager or Treasurer may authorize an increase or decrease in line-item appropriations within a fund if the total appropriations of the fund do not increase and if the aggregate change in the original appropriation item does not exceed $10,000 or 10% of the original appropriation.

c. By resolution, the Board may increase any appropriation item and/or fund to reflect receipt of any additional unbudgeted monies and make the corresponding change to appropriations or the unappropriated balance.

d. Any other budget amendments shall be adopted by resolution and consistent with Florida law.

The District Manager or Treasurer must establish administrative procedures to ensure that any budget amendments are in compliance with this Section 3 and Section 189.016, *Florida Statutes*, among other applicable laws. Among other procedures, the District Manager or Treasurer must ensure that any amendments to budget under subparagraphs c. and d. above are posted on the District's website within 5 days after adoption and remain on the website for at least 2 years.

SECTION 4. EFFECTIVE DATE. This Resolution shall take effect immediately upon adoption.

PASSED AND ADOPTED this 26th Day of October, 2021.

ATTEST:

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

_____
Secretary / Assistant Secretary

_____
Chair/Vice Chair, Board of Supervisors

Exhibit A: Fiscal Year 2021/2022 Budget

Exhibit A

Fiscal Year 2021/2022 Budget

CREEKVIEW
COMMUNITY DEVELOPMENT DISTRICT
PROPOSED BUDGET
FISCAL YEAR 2022

CREEKVIEW
COMMUNITY DEVELOPMENT DISTRICT
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CREEKVIEW
COMMUNITY DEVELOPMENT DISTRICT
GENERAL FUND BUDGET
FISCAL YEAR 2022

	Proposed Budget FY 2022
REVENUES	
Landowner contribution	$ 105,290
Total revenues	105,290
EXPENDITURES	
Professional & administrative	
Supervisors	8,000
Management/accounting/recording	45,000
Debt service fund accounting	4,167
Legal	25,000
Engineering	2,000
Audit	5,000
Arbitrage rebate calculation*	500
Dissemination agent*	833
Trustee*	5,000
Telephone	200
Postage	500
Printing & binding	500
Legal advertising	1,500
Annual special district fee	175
Insurance	5,500
Contingencies/bank charges	500
Website hosting & maintenance	705
Website ADA compliance	210
Total expenditures	105,290
Excess/(deficiency) of revenues over/(under) expenditures	-
Fund balance - beginning (unaudited)	-
Fund balance - ending	$ -

* These items will be realized when bonds are issued

CREEKVIEW
COMMUNITY DEVELOPMENT DISTRICT
DEFINITIONS OF GENERAL FUND EXPENDITURES

EXPENDITURES	FY 2022
Professional & administrative	
Supervisors	$ 8,000
Statutorily set at $200 for each meeting of the Board of Supervisors not to exceed $4,800 for each fiscal year.	
Management/accounting/recording	45,000
Wrathell, Hunt and Associates, LLC (WHA), specializes in managing community development districts by combining the knowledge, skills and experience of a team of professionals to ensure compliance with all of the District's governmental requirements. WHA develops financing programs, administers the issuance of tax exempt bond financings, operates and maintains the assets of the community.	
Debt service fund accounting	4,167
Legal	25,000
General counsel and legal representation, which includes issues relating to public finance, public bidding, rulemaking, open meetings, public records, real property dedications, conveyances and contracts.	
Engineering	2,000
The District's Engineer will provide construction and consulting services, to assist the District in crafting sustainable solutions to address the long term interests of the community while recognizing the needs of government, the environment and maintenance of the District's facilities.	
Audit	5,000
Statutorily required for the District to undertake an independent examination of its books, records and accounting procedures.	
Arbitrage rebate calculation*	500
To ensure the District's compliance with all tax regulations, annual computations are necessary to calculate the arbitrage rebate liability.	
Dissemination agent*	833
The District must annually disseminate financial information in order to comply with the requirements of Rule 15c2-12 under the Securities Exchange Act of 1934. Wrathell, Hunt & Associates serves as dissemination agent.	
Telephone	200
Telephone and fax machine.	
Postage	500
Mailing of agenda packages, overnight deliveries, correspondence, etc.	
Printing & binding	500
Letterhead, envelopes, copies, agenda packages	
Legal advertising	1,500
The District advertises for monthly meetings, special meetings, public hearings, public bids, etc.	
Annual special district fee	175
Annual fee paid to the Florida Department of Economic Opportunity.	
Insurance	5,500
The District will obtain public officials and general liability insurance.	
Contingencies/bank charges	500
Bank charges and other miscellaneous expenses incurred during the year and automated AP routing etc.	
Website hosting & maintenance	705
Website ADA compliance	210
Total expenditures	$ 105,290

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

10

RESOLUTION 2022-07

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT AUTHORIZING AN INDIVIDUAL DESIGNATED BY THE BOARD OF SUPERVISORS TO ACT AS THE DISTRICT'S PURCHASING AGENT FOR THE PURPOSE OF PROCURING, ACCEPTING, AND MAINTAINING ANY AND ALL CONSTRUCTION MATERIALS NECESSARY FOR THE CONSTRUCTION, INSTALLATION, MAINTENANCE OR COMPLETION OF THE DISTRICT'S INFRASTRUCTURE IMPROVEMENTS AS PROVIDED IN THE DISTRICT'S ADOPTED IMPROVEMENT PLAN; PROVIDING FOR THE APPROVAL OF A WORK AUTHORIZATION; PROVIDING FOR PROCEDURAL REQUIREMENTS FOR THE PURCHASE OF MATERIALS; APPROVING THE FORM OF A PURCHASE REQUISITION REQUEST; APPROVING THE FORM OF A PURCHASE ORDER; APPROVING THE FORM OF A CERTIFICATE OF ENTITLEMENT; AUTHORIZING THE PURCHASE OF INSURANCE; PROVIDING A SEVERABILITY CLAUSE; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the Creekview Community Development District ("District") is a local unit of special-purpose government created and existing pursuant to Chapter 190, *Florida Statutes*; and

WHEREAS, Chapter 190, *Florida Statutes*, authorizes the District to construct, install, operate and/or maintain systems and facilities for certain basic infrastructure; and

WHEREAS, the District's Board of Supervisors ("Board"), upon recommendation of the District Engineer, has adopted an improvement plan for the construction and installation of certain infrastructure improvements within the District ("Improvements"); and

WHEREAS, the District has or will enter into various construction contracts for the construction and installation of the Improvements ("Construction Contract(s)"); and

WHEREAS, the Construction Contracts allow, or will be amended to allow, for the direct purchase by the District of certain construction materials necessary for those contracts; and

WHEREAS, the District has determined that such direct purchase of construction materials will provide a significant construction cost reduction that is in the best interest of the District; and

WHEREAS, the District desires to have a District representative who is familiar with the project and who is knowledgeable in the area of procuring and handling construction materials act as its representative.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT:

SECTION 1. The District Engineer, the District Manager or another individual as shall be appointed by the Board ("Purchasing Agent") shall have the full authority of the District to issue purchase orders or enter into purchase agreements on behalf of the District at such times and intervals as it determines necessary for the timely receipt of construction materials required by the Contractor for the prosecution of the construction project.

SECTION 2. The Purchasing Agent shall purchase on behalf of the District only those materials identified in the Construction Contracts and in amounts not to exceed the cost amount contained therein and as included in the Construction Contracts.

SECTION 3. The Purchasing Agent shall be authorized to purchase on behalf of the District any additional construction materials that are identified in a schedule of values associated with any change order(s) to the Construction Contracts or that of any subcontractor to the Contractor which is approved by the District.

SECTION 4. Should the District Engineer act as the Purchasing Agent for any given Construction Contract, a work authorization of the District Engineer, a form of which is attached hereto as **Exhibit A,** is hereby approved and/or ratified, and the District Engineer shall be paid such reasonable fees, costs and expenses, related to its actions as the District's Purchasing Agent as provided for in the District Engineer's agreement with the District.

SECTION 5. The Purchasing Agent is further authorized to take any other administrative actions that are consistent with his/her duties as the Purchasing Agent, including but not limited to, negotiating for lower prices on materials from other suppliers, arranging for the storage, delivery, and protection of purchased materials, and sending and receiving notices and releases as are required by law.

SECTION 6. The District Manager is hereby directed to purchase Builders All Risk Insurance on behalf of the District and with the District as the named insured in such amounts as are necessary to cover the estimated costs of the construction materials pursuant to the Construction Contract.

SECTION 7. Unless otherwise provided in a written contract between the District and a particular contractor, the procurement procedures and its exhibits, attached hereto as **Composite Exhibit B** and incorporated herein by reference, are hereby approved and/or ratified, and shall be used by the Purchasing Agent for the purchase of construction materials on behalf of the District.

SECTION 8. The actions of current and prior members of the Board and District staff in effectuating the District's direct purchase of materials relative to the Construction Contracts, including but not limited to the execution of any documents related therewith, are hereby determined to be in accordance with the prior authorizations of the District's Chairman and/or the Board, and are hereby ratified, approved and confirmed all respects.

SECTION 9. If any provision of this Resolution is held to be illegal or invalid, the other provisions shall remain in full force and effect.

SECTION 10. This Resolution shall become effective upon its passage and shall remain in effect unless rescinded or repealed.

PASSED AND ADOPTED this 26th day of October, 2021.

ATTEST:

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

By:_____
Secretary/Assistant Secretary

By:_____
Chair/ Vice Chair, Board of Supervisors

Exhibit A: Form of Work Authorization
Exhibit B: Procurement Procedures for Owner Purchased Material

EXHIBIT A

Work Authorization
October 26, 2021

Board of Supervisors
Creekview Community Development District

Subject:**Work Authorization Number 1**
Creekview Community Development District

Dear Chairman, Board of Supervisors:

England-Thims & Miller, Inc. ("Engineer") is pleased to submit this work authorization to provide engineering services for the Creekview Community Development District ("District"). We will provide these services pursuant to our current agreement dated August 16, 2021 ("Engineering Agreement") as follows:

I. Scope of Work
The Engineer will act as Purchasing Agent for the District with respect to the direct purchase of construction materials for the District's Improvements in accordance with the procurement procedures adopted by the Board of Supervisors**.**

II. Compensation
The Engineer will be compensated for this work at the hourly rates established pursuant to the Engineering Agreement.

III. Other Direct Costs
Other direct costs include items such as printing, drawings, travel, deliveries, et cetera, pursuant to the Engineering Agreement.

This work authorization, together with the Engineering Agreement, represents the entire understanding between the District and the Engineer with regard to the referenced services and supersedes any previously executed proposal or agreement related to the provision of such services. If you wish to accept this work authorization, please sign where indicated and return to our office. Thank you for the opportunity to be of service.

APPROVED AND ACCEPTED

By:
_____
Authorized Representative of District
Date: _____

Sincerely,

_____
By:_____
_____

COMPOSITE EXHIBIT B

PROCUREMENT PROCEDURES FOR OWNER PURCHASED MATERIAL

1. Purchase Requisition Request Forms. At least ten (10) calendar days prior to CONTRACTOR ordering construction materials, CONTRACTOR shall prepare and forward to OWNER a separate Purchasing Requisition Request Form for each supplier in the form attached hereto as **Attachment 1**, specifically identifying the construction materials which CONTRACTOR plans to order from each supplier so that OWNER may, in its sole discretion, elect to purchase directly such construction materials.

2. Purchase Orders. After receipt of the Purchasing Requisition Request Form, the OWNER shall prepare Purchase Orders in the form attached hereto as **Attachment 2**, for construction materials which the OWNER wishes to purchase directly. Purchase Orders shall require that the supplier provide required shipping and handling insurance. Purchase Orders shall also require the delivery of the Owner Purchased Materials on the delivery dates provided by the CONTRACTOR in the Purchasing Requisition Request Form. Pursuant to the Purchase Order, the supplier will provide the CONTRACTOR the required quantities of construction material at the price established in the supplier's quote less any associated sales tax.

3. Certificate of Entitlement. The OWNER shall execute a separate Certificate of Entitlement for each Purchase Order in the form attached hereto as **Attachment 3**, and furnish a copy of same to the supplier and to the CONTRACTOR in accordance with Section 4. Each Certificate of Entitlement must have attached thereto the corresponding Purchase Order.

Each Certificate of Entitlement shall acknowledge that if the Department of Revenue determines the purchase is not a tax exempt purchase by a governmental entity, then the governmental entity will be responsible for any tax, penalties and interest determined to be due.

Each Certificate of Entitlement shall affirm that: (1) the attached Purchase Order is being issued directly to the vendor supplying the tangible personal property the CONTRACTOR will use in the identified public works; (2) the vendor's invoice will be issued directly to the governmental entity; (3) payment of the vendor's invoice will be made directly by the governmental entity to the vendor from public funds; (4) the governmental entity will take title to the tangible personal property from the vendor at the time of purchase or of delivery by the vendor; and (5) the governmental entity assumes the risk of damage or loss at the time of purchase or delivery by the vendor.

4. Transmission of Certificate of Entitlement and Attached Purchase Order. At least two (2) calendar days prior to CONTRACTOR placing OWNER'S order for the construction materials, OWNER shall forward each Certificate of Entitlement, together with the attached Purchase Order, to CONTRACTOR and to supplier. Promptly upon receipt of the Owner Purchased Materials specified in each Purchase Order, CONTRACTOR shall verify the purchase of the Owner Purchased Materials in accordance with the terms of the Purchase Order and in a manner to assure timely delivery of the Owner Purchased Materials.

5. Notice of Reduction in Contract Price. On or about the last business day of each month, OWNER shall deliver to the CONTRACTOR a Notice of Reduction in Contract Price (hereinafter "Notice"). Each Notice shall list all Owner Purchased Materials for the respective month and the total price for all such construction materials, plus all sales taxes which would have been associated with such construction materials had the CONTRACTOR purchased the construction materials. Each Notice may also include the total price and sales tax (had CONTRACTOR purchased) for any previously purchased Owner Purchased Materials which for any reason were not previously deducted from the contract price. The contract price will be reduced automatically and as a ministerial task by the amount set forth in each Notice. Each Notice will also reflect the amended contract balance reflecting the deductions taken in said Notice.

The intent of this provision is to cause the contract price to be reduced automatically by the amount OWNER pays for Owner Purchased Materials plus the amount of applicable sales tax that would have been paid for such construction materials, had the CONTRACTOR or any other non-tax exempt entity purchased the construction materials. All savings of sales taxes shall accrue solely to the benefit of OWNER, and CONTRACTOR shall not benefit whatsoever from savings of any such taxes.

6. Payment for Owner Purchased Materials. In order to arrange for the prompt payment to suppliers, the CONTRACTOR shall provide to the OWNER a list indicating on behalf of the owner of the Owner Purchased Materials within fifteen (15) calendar days of receipt of said Owner Purchased Materials. The list shall include a copy of the applicable Purchase Orders, invoices, delivery tickets, written acceptance of the delivered items, and such other documentation as may be reasonably required by the OWNER. Upon receipt of the appropriate documentation, the OWNER shall prepare a check drawn to the supplier based upon the receipt of data provided. OWNER will make payment to each supplier. The CONTRACTOR agrees to assist the OWNER to immediately obtain appropriate partial or final release of waivers.

OWNER shall be responsible for the full payment of all valid and due invoices for Owner Purchased Materials and shall not be entitled to retain the standard five percent (5%) to ten (10%) percent amount of the progress payment due to the CONTRACTOR as is otherwise provided for in the contract documents.

CONTRACTOR shall affirm that the vendor supplying the Owner Purchased Materials is not also the installer of the Owner Purchased Materials. CONTRACTOR shall further affirm that the installer of the Owner Purchased Materials did not manufacture, fabricate or furnish the Owner Purchased Materials.

7. CONTRACTOR Responsibilities. CONTRACTOR shall be fully responsible for all matters relating to ordering, storing, protecting, receipt, and handling for all construction materials including Owner Purchased Materials, in accordance with these procedures including, but not limited to, verifying correct quantities, verifying documents of orders in a timely manner, coordinating purchases, providing and obtaining all warranties and guarantees required by the contract documents, inspection and acceptance on behalf of the owner of the construction materials at the time of delivery, and loss or damage to the construction materials following acceptance of construction materials, due to the negligence of the CONTRACTOR. CONTRACTOR shall serve as bailee with respect to such Owner Purchased Materials. The CONTRACTOR shall coordinate delivery schedules, sequence of delivery, loading orientation, and other

arrangements normally required by the CONTRACTOR for the construction materials furnished including Owner Purchased Materials. The CONTRACTOR shall provide all services required for the unloading, handling and storage of construction materials through installation including Owner Purchased Materials. The CONTRACTOR agrees to indemnify and hold harmless the OWNER from any and all claims of whatever nature resulting from non-payment for Owner Purchased Materials arising from CONTRACTOR actions.

7.1 Inspection and Documentation. As Owner Purchased Materials are delivered to the job site, CONTRACTOR shall visually inspect all shipments from the suppliers, and approve the vendor's invoice for construction materials delivered. The CONTRACTOR shall assure that each delivery of Owner Purchased Material is accompanied by documentation adequate to identify the Purchase Order against which the purchase is made. This documentation may consist of a delivery ticket and an invoice from the supplier conforming to the Purchase Order together with such additional information as the OWNER may require. All invoices for Owner Purchase Materials shall include the Owner's consumer certificate of exemption number. The CONTRACTOR will then forward all such invoices to the OWNER. On or about the 15th and last day of each month (or the next succeeding business day), CONTRACTOR shall review all invoices submitted by all suppliers of Owner Purchased Materials delivered to the Project site(s) during that month and either concur or object to the OWNER's issuance of payment to the suppliers, based upon CONTRACTOR's records of Owner Purchased Materials delivered to the site and whether any defects or non-conformities exist in such Owner Purchased Materials.

7.2 Warranties, Guarantees, Repairs and Maintenance. The CONTRACTOR shall be responsible for obtaining and managing on behalf of the Owner all warranties and guarantees for all construction materials as required by the contract documents and shall fully warrant all construction materials including all Owner Purchased Materials. OWNER's purchase of various construction materials shall not in any manner impact or reduce CONTRACTOR's duty to warrant said construction materials. The OWNER may forward all repair, maintenance, non-conforming construction materials calls, or any other issues relating to the construction materials to the CONTRACTOR for resolution with the appropriate supplier, vendor, or subcontractor. The CONTRACTOR shall resolve all such calls or issues.

7.3 Records and Accountings. The CONTRACTOR shall maintain records of all Owner Purchased Materials it incorporates into the work from the stock of Owner Purchased Materials in its possession as bailee. The CONTRACTOR shall account monthly to the OWNER for any Owner Purchased Materials delivered into the CONTRACTOR's possession, indicating portions of all such construction materials which have been incorporated into the work.

7.4 Defective or Non-conforming Construction Materials. The CONTRACTOR shall ensure that Owner Purchased Materials conform to specifications, and determine prior to incorporation into the work if such construction materials are defective or non-conforming, whether such construction materials are identical to the construction materials ordered, and match the description on the bill of lading. If the CONTRACTOR discovers defective or non-conforming Owner Purchased Material upon such visual inspection, the CONTRACTOR shall not utilize such non-conforming or defective construction materials in the work and instead shall promptly notify the OWNER of the defective or non-conforming conditions so repair or replacement of such construction materials can occur without any undue delay or interruption to the Project. If the CONTRACTOR fails to adequately and properly perform such

inspection or otherwise incorporates into the Project defective or non-conforming Owner Purchased Materials, the condition of which it either knew or should have known by performance of an inspection, CONTRACTOR shall be responsible for all damages to OWNER resulting from CONTRACTOR's incorporation of such construction materials into the Project, including any available liquidated or delay damages.

8. Title. Notwithstanding the transfer of Owner Purchased Materials by the OWNER to the CONTRACTOR's possession as bailee for the OWNER, the OWNER shall retain legal and equitable title to any and all Owner Purchased Materials.

9. Insurance and Risk of Loss. The OWNER shall purchase and maintain Builder's Risk Insurance sufficient to protect against any loss or damage to Owner Purchased Materials. Owner shall be the named insured and such insurance shall cover the full value of any Owner Purchased Materials not yet incorporated into the Project during the period between the time the OWNER first takes title to any such Owner Purchased Materials and the time when the last of such Owner Purchased Materials is incorporated into the Project or consumed in the process of completing the Project.

10. No Damages for Delay. The OWNER shall in no way be liable for, and CONTRACTOR waives all claims for, any damages relating to or caused by alleged interruption or delay due to ordering or arrival of Owner Purchased Materials, defects, or other problems of any nature with such construction materials, late payment for such construction materials, or any other circumstance associated with Owner Purchased Materials, regardless of whether OWNER's conduct caused, in whole or in part, such alleged damages. The foregoing waiver by CONTRACTOR includes damages for acceleration and inefficiencies. CONTRACTOR accepts from OWNER as further and specific consideration for the foregoing waivers, OWNER's undertaking to pay for and finance all Owner Purchased Materials.

Attachment 1

PURCHASE REQUISITION REQUEST FORM

1. Contact Person for the material supplier.

   NAME: _____

   ADDRESS: _____

   TELEPHONE NUMBER: _____

2. Manufacturer or brand, model or specification number of the item.

   _____

   _____

3. Quantity needed as estimated by CONTRACTOR. _____

4. The price quoted by the supplier for the construction materials identified above.

   $_____

5. The sales tax associated with the price quote. $_____

6. Shipping and handling insurance cost. $_____

7. Delivery dates as established by CONTRACTOR. _____

8. By submitting this request, CONTRACTOR affirms that it has read and will comply with the District's *Procurement Procedures for Owner Purchased Material*.

9. By submitting this request, CONTRACTOR further affirms that (1) it is not the manufacturer of the materials, (2) it does not have exclusive rights from the manufacturer to furnish and install the materials, and (3) it has not already purchased the materials.

OWNER: **Creekview Community Development District**

_____ _____

Authorized Signature (Title) Date

CONTRACTOR: _____

_____ _____

Authorized Signature (Title) Date

Attachment 2

PURCHASE ORDER
CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

"**Owner**"		"**Seller**"	
Owner:	**Creekview Community Development District**	Seller:	
Address:	c/o Wrathell, Hunt & Associates 2300 Glades Rd., Ste. # 410W Boca Raton, FL 33431	Address:	
Phone:	(561) 571-0010	Phone:	

"**Project**"

Project Name:		Contract Date:	
Project Address:			

Description of Goods or Services – The Owner and Seller are entering into this Purchase Order Agreement for the purpose of the Owner purchasing the items ("**Goods**") listed in the proposal attached as **Exhibit A.**
Schedule – The Goods shall be delivered within _____ days from the date of this Order.
Price – $_____
Certificate of Exemption #_____

IN WITNESS HEREOF, the parties have executed this Order effective as of the date executed below. By executing this document below, Seller acknowledges that it has read all of the terms and provisions of this Order, including the Terms and Conditions attached hereto as **Exhibit B**, and agrees to deliver the Goods as described herein and comply fully with the terms and conditions hereof.

Owner	Seller
By:	By:
Name:	Name:
Title:	Title:
Date Executed:	Date Executed:

EXHIBIT A: Proposal
EXHIBIT B: Terms and Conditions

EXHIBIT A

[attach proposal]

EXHIBIT B

TERMS AND CONDITIONS

1. PRICE. The Price set forth above includes all Goods, insurance, warranties and other materials or services (including without limitation all packing, loading or freight) necessary to produce and deliver the Goods.
2. SCHEDULE. Time is of the essence with respect to this Order, and all Goods shall be produced and delivered within the times set forth in the Schedule. Owner may cancel this Order or any part thereof or reject delivery of Goods if such delivery or performance is not in material accordance with the specifications of this Order, including the Schedule.
3. DELIVERY AND INSPECTION.
   a. All shipments of Goods are to be made, with all shipping costs prepaid by Seller (e.g., insurance, packing, loading, freight, etc.), to the receiving point specified above. Title, and risk of loss, shall pass to Owner at the time such Goods are delivered at the Project site and accepted by Owner or Owner's contractor, provided however that Owner shall have a reasonable opportunity to inspect such Goods prior to acceptance.
   b. All Goods are subject to inspection and approval by Owner at a reasonable time post-delivery. Owner may return Goods not meeting specifications (including over-shipments) at the Seller's expense and risk. Owner will notify Seller of failure. Return authorizations for Goods not received within 30 days will deem such Goods as donations to Owner.
4. TERMS OF PAYMENT. Seller's Invoice ("**Invoice**") must be submitted before payment will be made by Owner pursuant to this Order. Owner shall make payment within 30 days of receipt of a proper invoice, and pursuant to the Local Government Prompt Payment Act, Sections 218.70 et seq., *Florida Statutes* (2019). Any indebtedness of Seller to Owner may, at Owner's option, be credited against amounts owing by Owner hereunder.
5. WARRANTY. Seller shall take all necessary steps to assign any manufacturer's warranties to the Owner. Seller warrants that the title to Goods conveyed shall be good, that the transfer of the Goods shall be rightful, and that the Goods shall be free from any security interest, lien or encumbrance. Seller further warrants that the Goods are free of any rightful claim of infringement, and shall indemnify, defend, and hold harmless the Indemnitees (defined below) against any such claim. Further, the Goods shall be new, shall be free from defects, shall be of merchantable quality, and shall be fit for use. Seller agrees, without prejudice to any other rights Owner may have, to replace or otherwise remedy any defective Goods without further cost to Owner or, at Owner's option, to reimburse Owner for its cost of replacing defective Goods. All Goods are subject to inspection by Owner before, upon, and within a reasonable time after delivery. Goods shall not be replaced without Owner's prior written instructions. Any acceptance by Owner shall not prevent Owner from later rejecting non-conforming Goods. The warranty provided herein shall survive the completion or termination of this Order and is in addition to any warranties provided by law.
6. COMPLIANCE WITH LAW. Seller agrees that at all times it will comply with all applicable federal, state, municipal and local laws, orders and regulations.
7. INDEMNITY. To the fullest extent permitted by law, and in addition to any other obligations of Seller under the Order or otherwise, Seller shall indemnify, hold harmless, and defend Owner, and Owner's supervisors, staff, consultants, agents, subcontractors, and employees (together, "**Indemnitees**") from all liabilities, damages, losses and costs, including, but not limited to, reasonable attorney's fees, to the extent caused in whole or in part by the negligence, recklessness or intentional wrongful misconduct of the Seller, or any subcontractor, any supplier, or any individual or entity directly or indirectly employed by any of them, and arising out of or incidental to the performance of this Order. The Seller shall ensure that any and all subcontractors include this express provision for the benefit of the Indemnitees. The parties agree that this paragraph is fully enforceable pursuant to Florida law. In the event that this section is determined to be unenforceable, this paragraph shall be reformed to give the paragraph the maximum effect allowed by Florida law and for the benefit of the Indemnitees. The provisions of this section shall survive the completion or earlier termination of this Order, and are not intended to limit any of the other rights and/or remedies provided to the District hereunder.
8. INSURANCE. At all times during the term of this Order agreement, Seller, at its sole cost and expense, shall maintain insurance coverages of the types and amounts set forth below:

a. Commercial general liability insurance with minimum limits of liability not less than $1,000,000. Such insurance shall include coverage for contractual liability.
b. Workers' Compensation Insurance covering all employees of Seller in statutory amounts, and employer's liability insurance with limits of not less than $100,000 each accident.
c. Comprehensive automobile liability insurance covering all automobiles used by Seller, with limits of liability of not less than $1,000,000 each occurrence combined single limit bodily injury and property damage.

9. DEFAULT. Upon any material default by Seller hereunder, Owner may, in addition to any other remedies available to Owner at law or in equity, cancel this Order without penalty or liability by written notice to Seller.
10. LIMITATION OF LIABILITY. Nothing herein shall be construed to be a waiver of the Owner's limit of liability contained in Section 768.28, *Florida Statutes*, or other statute or law.

11. WAIVER. Any failure of Owner to enforce at any time, or for any period of time, any of the provisions of this Order shall not constitute a waiver of such provisions or a waiver of Owner's right to enforce each and every provision.
12. MODIFICATIONS. This Order supersedes all prior discussions, agreements and understandings between the parties and constitutes the entire agreement between the parties with respect to the transaction herein contemplated. Changes, modifications, waivers, additions or amendments to the terms and conditions of this Order shall be binding on Owner only if such changes, modifications, waivers, additions or amendments are in writing and signed by a duly authorized representative of Owner.
13. APPLICABLE LAW. The validity, interpretation, and performance of this Order shall be governed by the laws of the State of Florida, in force at the date of this Order. Where not modified by the terms herein, the provisions of Florida's enactment of Article 2 of the Uniform Commercial Code shall apply to this transaction.
14. MECHANIC'S LIENS. Notwithstanding that Owner is a local unit of special purpose government and not subject to the lien provisions of Chapter 713, *Florida Statutes*, Seller agrees to keep the District's property free of all liens, including equitable liens, claims or encumbrances (collectively, "**Liens**") arising out of the delivery of any Goods by Seller, and shall furnish Owner with appropriate lien waivers from all potential claimants upon request of Owner. If any Liens are filed, Owner may without waiving its rights based on such breach by Seller or releasing Seller from any obligations hereunder, pay or satisfy the same and in such event the sums so paid by Owner shall be due and payable by Seller immediately and without notice or demand, with interest from the date paid by Owner through the date paid by Seller, at the highest rate permitted by law.
15. PERMITS AND LICENSES. Before commencing performance hereunder, Seller shall obtain all permits, approvals, certificates and licenses necessary for the proper performance of this Order and pay all fees and charges therefore. The originals of all such documents shall be delivered to Owner upon receipt by Seller.
16. PARTIAL INVALIDITY. If in any instance any provision of this Order shall be determined to be invalid or unenforceable under any applicable law, such provision shall not apply in such instance, but the remaining provisions shall be given effect in accordance with their terms.
17. ASSIGNMENT AND SUBCONTRACTING. This Order shall not be assigned or transferred by Seller without prior written approval by Owner, and any attempted assignment or transfer without such consent shall be void.
18. RELATIONSHIP. The relationship between Owner and Seller shall be that of independent contractor, and Seller, its agents and employees, shall under no circumstances be deemed employees, agents or representatives of Owner.
19. NOTICES. Any notice, approval or other communication required hereunder must be in writing and shall be deemed given if delivered by hand or mailed by registered mail or certified mail addressed to the parties hereto as indicated on page 1.
20. PUBLIC ENTITY CRIMES. Seller certifies, by acceptance of this purchase order, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction per the provisions of section 287.133(2)(a), *Florida Statutes*.
21. SCRUTINIZED COMPANIES. Supplier certifies, by acceptance of this purchase order, that neither it nor any of its officers, directors, executives, partners, shareholders, members, or agents is on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, created pursuant to section 215.473, *Florida Statutes*, and in the event such status changes, Seller shall immediately notify Owner.
22. TERMINATION. Notwithstanding anything herein to the contrary, Owner shall have the right, at its sole election, to terminate this Order for any cause whatsoever upon the delivery of written notice to Seller. Upon such termination, Seller shall have no remedy against Owner, other than for payment of Goods already produced pursuant to specific written direction by Owner pursuant to Section 2 above, subject to any offsets or claims that Owner may have.
23. PUBLIC RECORDS. Seller acknowledges that this Agreement and all the documents pertaining thereto may be public records and subject to the provisions of Chapter 119, *Florida Statutes*.
24. CONFLICTS. To the extent of any conflict between this document and the Purchase Order or **Exhibit A**, this document shall control.

Attachment 3

CERTIFICATE OF ENTITLEMENT

The undersigned authorized representative of **Creekview Community Development District** (hereinafter "Governmental Entity"), Florida Consumer's Certificate of Exemption Number _____, affirms that the tangible personal property purchased pursuant to Purchase Order Number _____ from _____ (Vendor) on or after _____, 20__ (date) will be incorporated into or become a part of a public facility as part of a public works contract pursuant to Contract dated _____ with _____ (Contractor) for the construction of _____.

The Governmental Entity affirms that the purchase of the tangible personal property contained in the attached Purchase Order meets the following exemption requirements contained in Section 212.08(6), F.S., and Rule 12A-1.094, F.A.C.: (***You must initial each of the following requirements***.)

____ 1. The attached Purchase Order is issued directly to the vendor supplying the tangible personal property the Contractor will use in the identified public works.
____ 2. The vendor's invoice will be issued directly to Governmental Entity.
____ 3. Payment of the vendor's invoice will be made directly by Governmental Entity to the vendor from public funds.
____ 4. Governmental Entity will take title to the tangible personal property from the vendor at the time of purchase or of delivery by the vendor.
____ 5. Governmental Entity assumes the risk of damage or loss at the time of purchase or delivery by the vendor.

The Governmental Entity affirms that if the tangible personal property identified in the attached Purchase Order does not qualify for the exemption provided in Section 212.08(6), F.S., and Rule 12A-1.094, F.A.C., the Governmental Entity will be subject to the tax, interest, and penalties due on the tangible personal property purchased. If the Florida Department of Revenue determines that the tangible personal property purchased tax-exempt by issuing this Certificate does not qualify for the exemption, the Governmental Entity will be liable for any tax, penalty, and interest determined to be due.

I understand that if I fraudulently issue this certificate to evade the payment of sales tax I will be liable for payment of the sales tax plus a penalty of 200% of the tax and may be subject to conviction of a third degree felony. Under the penalties of perjury, I declare that I have read the foregoing Certificate of Entitlement and the facts stated in it are true.

_____ _____
Signature of Authorized Representative of Governmental Entity — Title

Creekview Community Development District _____
Purchaser's Name — Date

Federal Employer Identification Number: _____
Telephone Number: _____

You must attach a copy of the Purchase Order to this Certificate of Entitlement. Do not send to the Florida Department of Revenue. This Certificate of Entitlement must be retained in the Vendor's and the Contractor's books and records. This form supplements and supersedes (to the extent of any conflict) any prior certificates addressing the same purchase.

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

11A

PUBLISHER AFFIDAVIT
CLAY TODAY
Published Weekly
Orange Park, Florida

STATE OF FLORIDA
COUNTY OF CLAY:

Before the undersigned authority personally appeared Jon Cantrell, who on oath says that he is the publisher of the "Clay Today" a newspaper published weekly at Orange Park in Clay County, Florida; that the attached copy of advertisement being a

NOTICE OF RULE DEVELOPMENT

in the matter of

RULES OF PROCEDURE

LEGAL: 48393 ORDER: 328951

was published in said newspaper in the issues:

09/16/2021

Affiant further says that said "Clay Today" is a newspaper published at Orange Park, in said Clay County, Florida, and that the said newspaper has heretofore been continuously published in said Clay County, Florida, weekly, and has been entered as Periodical material matter at the post office in Orange Park, in said Clay County, Florida, for period of one year next proceeding the first publication of the attached copy of advertisement; and affiant further says that he has neither paid nor promised any person, firm or corporation any discount, rebate, commission or refund for the purpose of securing this advertisement for publication in the said newspaper.

Sworn to me and subscribed before me 09/16/2021.

Christie Lou Wayne
NOTARY PUBLIC, STATE OF FLORIDA

NOTARY PUBLIC STATE OF FLORIDA
CHRISTIE LOU WAYNE
MY COMMISSION # HH34426
EXPIRES: September 20, 2024

3515 US HWY 17 Suite A, Fleming Island FL 32003
Telephone (904) 264-3200 - FAX (904) 264-3285
E-Mail: Christie@opcfla.com

NOTICE OF RULE DEVELOPMENT BY THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

In accord with Chapters 120 and 190, Florida Statutes, the Creekview Community Development District ("District") hereby gives notice of its intention to develop Rules of Procedure to govern the operations of the District.

The Rules of Procedure will address such areas as the Board of Supervisors, officers and voting, district offices, public information and inspection of records, policies, public meetings, hearings and workshops, rulemaking proceedings and competitive purchase including procedure under the Consultants Competitive Negotiation Act, procedure regarding auditor selection, purchase of insurance, pre-qualification, construction contracts, goods, supplies and materials, maintenance services, contractual services and protests with respect to proceedings, as well as any other area of the general operation of the District.

The purpose and effect of the Rules of Procedure is to provide for efficient and effective District operations and to ensure compliance with recent changes to Florida law. The legal authority for the adoption of the proposed Rules of Procedure includes sections 190.011(5), 190.011(15) and 190.035, Florida Statutes (2021). The specific laws implemented in the Rules of Procedure include, but are not limited to, sections 112.08, 112.3143, 112.31446, 112.3145, 119.07, 119.0701, 189.053, 189.069(2)(a)16, 190.006, 190.007, 190.008, 190.011(3), 190.011(5), 190.011(15), 190.033, 190.035, 218.33, 218.391, 255.05, 255.0518, 255.0525, 255.20, 286.0105, 286.011, 286.0113, 286.0114, 287.017, 287.055 and 287.084, Florida Statutes (2021).

A copy of the proposed Rules of Procedure may be obtained by contacting the District Manager, c/o Wrathell, Hunt and Associates, LLC, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431, Phone: (877) 276-0889.

Craig Wrathell, District Manager
Creekview Community Development District

Legal 48393 published Sept 16, 2021 in Clay County's Clay Today newspaper

PUBLISHER AFFIDAVIT
CLAY TODAY
Published Weekly
Orange Park, Florida

STATE OF FLORIDA
COUNTY OF CLAY:

Before the undersigned authority personally appeared Jon Cantrell, who on oath says that he is the publisher of the "Clay Today" a newspaper published weekly at Orange Park in Clay County, Florida; that the attached copy of advertisement being a

NOTICE OF RULEMAKING

in the matter of

RULES OF PROCEDURE

LEGAL: 48394 ORDER: 329004

was published in said newspaper in the issues:

09/23/2021

Affiant further says that said "Clay Today" is a newspaper published at Orange Park, in said Clay County, Florida, and that the said newspaper has heretofore been continuously published in said Clay County, Florida, weekly, and has been entered as Periodical material matter at the post office in Orange Park, in said Clay County, Florida, for period of one year next proceeding the first publication of the attached copy of advertisement; and affiant further says that he has neither paid nor promised any person, firm or corporation any discount, rebate, commission or refund for the purpose of securing this advertisement for publication in the said newspaper.

NOTICE OF RULEMAKING REGARDING RULES OF PROCEDURE BY CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

A public hearing will be conducted by the Board of Supervisors of Creekview Community Development District ("District") on October 26, 2021, at 9:30 a.m. at the offices of Carlton Construction, Inc., 4615 U.S. Highway 17, Suite 1, Fleming Island, Florida 32003.

In accord with Chapters 120 and 190, Florida Statutes, the District hereby gives the public notice of its intent to adopt its proposed Rules of Procedure. The purpose and effect of the proposed Rules of Procedure is to provide for efficient and effective District operations. The Rules of Procedure may address such areas as the Board of Supervisors, officers and voting, district offices, public information and inspection of records, policies, public meetings, hearings and workshops, rulemaking proceedings and competitive purchase including procedure under the Consultants Competitive Negotiation Act, procedure regarding auditor selection, purchase of insurance, pre-qualification, construction contracts, goods, supplies and materials, maintenance services, contractual services and protests with respect to proceedings, as well as any other area of the general operation of the District. Prior notice of rule development was published in the Clay Today on September 16, 2021.

Specific legal authority for the adoption of the proposed Rules of Procedure includes Sections 190.011(5), 190.011(15) and 190.035, Florida Statutes (2021). The specific laws implemented in the Rules of Procedure include, but are not limited to, Sections 112.08, 112.3143, 112.31446, 112.3145, 119.07, 119.0701, 189.053, 189.069(2)(a)16, 190.006, 190.007, 190.008, 190.011(3), 190.011(5), 190.011(15), 190.033, 190.035, 218.33, 218.391, 255.05, 255.0518, 255.0525, 255.20, 286.0105, 286.011, 286.0113, 286.0114, 287.017, 287.055 and 287.084, Florida Statutes (2021).

A copy of the proposed Rules of Procedure may be obtained by contacting the District Manager's Office at 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431 or by calling (877) 276-0889 ("District Manager's Office").

Any person who wishes to provide the District with a proposal for a lower cost regulatory alternative as provided by Section 120.541(1), Florida Statutes, must do so in writing within twenty one (21) days after publication of this notice to the District Manager's Office.

This public hearing may be continued to a date, time, and place to be specified on the record at the hearing without additional notice. If anyone chooses to appeal any decision of the Board with respect to any matter considered at a public hearing, such person will need a record of the proceedings and should accordingly ensure that a verbatim record of the proceedings is made which includes the testimony and evidence upon which such appeal is to be based. At the hearing, staff or Supervisors may participate in the public hearing by speaker telephone. Pursuant to the provisions of the Americans with Disabilities Act, any person requiring special accommodations at this meeting because of a disability or physical impairment or requiring assistance to use any communications media technology that may be utilized should contact the District Manager's Office at least forty-eight (48) hours prior to the meeting. If you are hearing or speech impaired, please contact the Florida Relay Service at 1-800-955-8771 or 1 800-955-8770 for aid in contacting the District Office.

Creekview Community Development District
Craig Wrathell, District Manager

Legal 48394 published Sept 23, 2021 in Clay County's Clay Today newspaper

Sworn to me and subscribed before me 09/23/2021.

NOTARY PUBLIC, STATE OF FLORIDA

NOTARY PUBLIC STATE OF FLORIDA
CHRISTIE LOU WAYNE
MY COMMISSION # HH34426
EXPIRES: September 20, 2024

3515 US HWY 17 Suite A, Fleming Island FL 32003
Telephone (904) 264-3200 - FAX (904) 264-3285
E-Mail: Christie@opcfla.com

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

11B

RESOLUTION 2022-08

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT ADOPTING RULES OF PROCEDURE; PROVIDING A SEVERABILITY CLAUSE; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the Creekview Community Development District (the "District") is a local unit of special purpose government created and existing pursuant to Chapter 190, *Florida Statutes*, being situated entirely within Clay County, Florida; and

WHEREAS, to provide for efficient and effective District operations and to maintain compliance with Florida law, the Board of Supervisors finds that it is in the best interests of the District to adopt by resolution the Rules of Procedure attached hereto as **Exhibit A** for immediate use and application; and

WHEREAS, the Board of Supervisors has complied with applicable Florida law concerning rule development and adoption; and

WHEREAS, the Board of Supervisors additionally finds that it is in the best interests of the District to adopt by resolution the Rules of Procedure attached hereto as **Exhibit A** for immediate use and application.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT:

SECTION 1. The attached Rules of Procedure are hereby adopted pursuant to this resolution as necessary for the conduct of District business. These Rules of Procedure shall stay in full force and effect until such time as the Board of Supervisors may amend these rules in accordance with Chapter 190, *Florida Statutes*.

SECTION 2. If any provision of this resolution is held to be illegal or invalid, the other provisions shall remain in full force and effect.

SECTION 3. This resolution shall become effective upon its passage and shall remain in effect unless rescinded or repealed.

PASSED AND ADOPTED this 26th day of October, 2021.

ATTEST:	**CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT**
_____	_____
Secretary/Assistant Secretary	Chair/Vice Chair, Board of Supervisors

Exhibit A: Rules of Procedure

EXHIBIT A
RULES OF PROCEDURE
CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

EFFECTIVE AS OF OCTOBER 26, 2021

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Rule 1.0 General.

(1) The Creekview Community Development District ("District") was created pursuant to the provisions of Chapter 190 of the Florida Statutes, and was established to provide for the ownership, operation, maintenance, and provision of various capital facilities and services within its jurisdiction. The purpose of these rules ("Rules") is to describe the general operations of the District.

(2) Definitions located within any section of these Rules shall be applicable within all other sections, unless specifically stated to the contrary.

(3) Unless specifically permitted by a written agreement with the District, the District does not accept documents filed by electronic mail or facsimile transmission. Filings are only accepted during normal business hours.

(4) A Rule of the District shall be effective upon adoption by affirmative vote of the District Board. After a Rule becomes effective, it may be repealed or amended only through the rulemaking procedures specified in these Rules. Notwithstanding, the District may immediately suspend the application of a Rule if the District determines that the Rule conflicts with Florida law. In the event that a Rule conflicts with Florida law and its application has not been suspended by the District, such Rule should be interpreted in the manner that best effectuates the intent of the Rule while also complying with Florida law. If the intent of the Rule absolutely cannot be effectuated while complying with Florida law, the Rule shall be automatically suspended.

Specific Authority: §§ 190.011(5), 190.011(15), Fla. Stat.
Law Implemented: §§ 190.011(5), 190.011(15), Fla. Stat.

Rule 1.1 Board of Supervisors; Officers and Voting.

(1) Board of Supervisors. The Board of Supervisors of the District ("Board") shall consist of five (5) members. Members of the Board ("Supervisors") appointed by ordinance or rule or elected by landowners must be citizens of the United States of America and residents of the State of Florida. Supervisors elected or appointed by the Board to elector seats must be citizens of the United States of America, residents of the State of Florida and of the District and registered to vote with the Supervisor of Elections of the county in which the District is located and for those elected, shall also be qualified to run by the Supervisor of Elections. The Board shall exercise the powers granted to the District under Florida law.

(a) Supervisors shall hold office for the term specified by Section 190.006 of the Florida Statutes. If, during the term of office, any Board member(s) vacates their office, the remaining member(s) of the Board shall fill the vacancies by appointment for the remainder of the term(s). If three or more vacancies exist at the same time, a quorum, as defined herein, shall not be required to appoint replacement Board members.

(b) Three (3) members of the Board shall constitute a quorum for the purposes of conducting business, exercising powers and all other purposes. A Board member shall be counted toward the quorum if physically present at the meeting, regardless of whether such Board member is prohibited from, or abstains from, participating in discussion or voting on a particular item.

(c) Action taken by the Board shall be upon a majority vote of the members present, unless otherwise provided in the Rules or required by law. Subject to Rule 1.3(10), a Board member participating in the Board meeting by teleconference or videoconference shall be entitled to vote and take all other action as though physically present.

(d) Unless otherwise provided for by an act of the Board, any one Board member may attend a mediation session on behalf of the Board. Any agreement resulting from such mediation session must be approved pursuant to subsection (1)(c) of this Rule.

(2) Officers. At the first Board meeting held after each election where the newly elected members take office, the Board shall select a Chairperson, Vice-Chairperson, Secretary, Assistant Secretary, and Treasurer.

(a) The Chairperson must be a member of the Board. If the Chairperson resigns from that office or ceases to be a member of the Board, the Board shall select a Chairperson. The Chairperson serves at the pleasure of the Board. The Chairperson shall be authorized to execute resolutions and contracts on the District's behalf. The Chairperson shall convene and conduct all meetings of the Board. In the event the Chairperson is unable to attend a meeting, the Vice-Chairperson shall convene and conduct the meeting. The Chairperson or Vice-Chairperson may delegate the responsibility of conducting the meeting

to the District's manager ("District Manager") or District Counsel, in whole or in part.

(b) The Vice-Chairperson shall be a member of the Board and shall have such duties and responsibilities as specifically designated by the Board from time to time. The Vice-Chairperson has the authority to execute resolutions and contracts on the District's behalf in the absence of the Chairperson. If the Vice-Chairperson resigns from office or ceases to be a member of the Board, the Board shall select a Vice-Chairperson. The Vice-Chairperson serves at the pleasure of the Board.

(c) The Secretary of the Board serves at the pleasure of the Board and need not be a member of the Board. The Secretary shall be responsible for maintaining the minutes of Board meetings and may have other duties assigned by the Board from time to time. An employee of the District Manager may serve as Secretary. The Secretary shall be bonded by a reputable and qualified bonding company in at least the amount of one million dollars ($1,000,000), or have in place a fidelity bond, employee theft insurance policy, or a comparable product in at least the amount of one million dollars ($1,000,000) that names the District as an additional insured.

(d) The Treasurer need not be a member of the Board but must be a resident of the State of Florida. The Treasurer shall perform duties described in Section 190.007(2) and (3) of the Florida Statutes, as well as those assigned by the Board from time to time. The Treasurer shall serve at the pleasure of the Board. The Treasurer shall either be bonded by a reputable and qualified bonding company in at least the amount of one million dollars ($1,000,000), or have in place a fidelity bond, employee theft insurance policy, or a comparable product in at least the amount of one million dollars ($1,000,000) that names the District as an additional insured.

(e) In the event that both the Chairperson and Vice-Chairperson are absent from a Board meeting and a quorum is present, the Board may designate one of its members or a member of District staff to convene and conduct the meeting. In such circumstances, any of the Board members present are authorized to execute agreements, resolutions, and other documents approved by the Board at such meeting. In the event that the Chairperson and Vice-Chairperson are both unavailable to execute a document previously approved by the Board, the Secretary or any Assistant Secretary may execute such document.

(f) The Board may assign additional duties to District officers from time to time, which include, but are not limited to, executing documents on behalf of the District.

(g) The Chairperson, Vice-Chairperson, and any other person authorized by District Resolution may sign checks and warrants for the District, countersigned by the Treasurer or other persons authorized by the Board.

(3) Committees. The Board may establish committees of the Board, either on a permanent or temporary basis, to perform specifically designated functions. Committees may include individuals who are not members of the Board. Such functions may include, but are not limited to, review of bids, proposals, and qualifications, contract negotiations, personnel matters, and budget preparation.

(4) Record Book. The Board shall keep a permanent record book entitled "Record of Proceedings," in which shall be recorded minutes of all meetings, resolutions, proceedings, certificates, and corporate acts. The Records of Proceedings shall be located at a District office and shall be available for inspection by the public.

(5) Meetings. For each fiscal year, the Board shall establish a schedule of regular meetings, which shall be published in a newspaper of general circulation in the county in which the District is located and filed with the local general-purpose governments within whose boundaries the District is located. All meetings of the Board and Committees serving an advisory function shall be open to the public in accord with the provisions of Chapter 286 of the Florida Statutes.

(6) Voting Conflict of Interest. The Board shall comply with Section 112.3143 of the Florida Statutes, so as to ensure the proper disclosure of conflicts of interest on matters coming before the Board for a vote. For the purposes of this section, "voting conflict of interest" shall be governed by the Florida Constitution and Chapters 112 and 190 of the Florida Statutes, as amended from time to time. Generally, a voting conflict exists when a Board member is called upon to vote on an item which would inure to the Board member's special private gain or loss or the Board member knows would inure to the special private gain or loss of a principal by whom the Board member is retained, the parent organization or subsidiary of a corporate principal, a business associate, or a relative including only a father, mother, son, daughter, husband, wife, brother, sister, father-in-law, mother-in-law, son-in-law, and daughter-in-law.

(a) When a Board member knows the member has a conflict of interest on a matter coming before the Board, the member should notify the Board's Secretary prior to participating in any discussion with the Board on the matter. The member shall publicly announce the conflict of interest at the meeting. This announcement shall appear in the minutes.

If the Board member was elected at a landowner's election or appointed to fill a vacancy of a seat last filled at a landowner's election, the Board member may vote or abstain from voting on the matter at issue. If the Board member was elected by electors residing within the District, the Board member is prohibited from voting on the matter at issue. In the event that the Board member intends to abstain or is prohibited from voting, such Board member shall not participate in the discussion on the item subject to the vote.

The Board's Secretary shall prepare a Memorandum of Voting Conflict (Form 8B) which shall then be signed by the Board member, filed with the Board's

Secretary, and provided for attachment to the minutes of the meeting within fifteen (15) days of the meeting.

(b) If a Board member inadvertently votes on a matter and later learns he or she has a conflict on the matter, the member shall immediately notify the Board's Secretary. Within fifteen (15) days of the notification, the member shall file the appropriate Memorandum of Voting Conflict, which will be attached to the minutes of the Board meeting during which the vote on the matter occurred. The Memorandum of Voting Conflict shall immediately be provided to other Board members and shall be read publicly at the next meeting held subsequent to the filing of the Memorandum of Voting Conflict. The Board member's vote is unaffected by this filing.

(c) It is not a conflict of interest for a Board member, the District Manager, or an employee of the District to be a stockholder, officer or employee of a landowner or of an entity affiliated with a landowner.

(d) In the event that a Board member elected at a landowner's election or appointed to fill a vacancy of a seat last filled at a landowner's election, has a continuing conflict of interest, such Board member is permitted to file a Memorandum of Voting Conflict at any time in which it shall state the nature of the continuing conflict. Only one such continuing Memorandum of Voting Conflict shall be required to be filed for each term the Board member is in office.

Specific Authority: §§ 190.011(5), 190.011(15), Fla. Stat.
Law Implemented: §§ 112.3143, 190.006, 190.007, Fla. Stat.

Rule 1.2 District Offices; Public Information and Inspection of Records; Policies; Service Contract Requirements; Financial Disclosure Coordination.

(1) District Offices. Unless otherwise designated by the Board, the official District office shall be the District Manager's office identified by the District Manager. If the District Manager's office is not located within the county in which the District is located, the Board shall designate a local records office within such county which shall at a minimum contain, but not be limited to, the following documents:

(a) Agenda packages for prior 24 months and next meeting;

(b) Official minutes of meetings, including adopted resolutions of the Board;

(c) Names and addresses of current Board members and District Manager, unless such addresses are protected from disclosure by law;

(d) Adopted engineer's reports;

(e) Adopted assessment methodologies/reports;

(f) Adopted disclosure of public financing;

(g) Limited Offering Memorandum for each financing undertaken by the District;

(h) Proceedings, certificates, bonds given by all employees, and any and all corporate acts;

(i) District policies and rules;

(j) Fiscal year end audits; and

(k) Adopted budget for the current fiscal year.

The District Manager shall ensure that each District records office contains the documents required by Florida law.

(2) Public Records. District public records include all documents, papers, letters, maps, books, tapes, photographs, films, sound recordings, data processing software, or other material, regardless of the physical form, characteristics, or means of transmission, made or received in connection with the transaction of official business of the District. All District public records not otherwise restricted by law may be copied or inspected at the District Manager's office during regular business hours. Certain District records can also be inspected and copied at the District's local records office during regular business hours. All written public records requests shall be directed to the Secretary who by these rules is appointed as the District's records custodian. Regardless of the form of the request, any Board member or staff member who receives a public records request shall immediately forward or communicate such request to the Secretary for coordination of a prompt response. The Secretary,

after consulting with District Counsel as to the applicability of any exceptions under the public records laws, shall be responsible for responding to the public records request. At no time can the District be required to create records or summaries of records, or prepare opinions regarding District policies, in response to a public records request.

(3) Service Contracts. Any contract for services, regardless of cost, shall include provisions required by law that require the contractor to comply with public records laws. The District Manager shall be responsible for initially enforcing all contract provisions related to a contractor's duty to comply with public records laws.

(4) Fees; Copies. Copies of public records shall be made available to the requesting person at a charge of $0.15 per page for one-sided copies and $0.20 per page for two-sided copies if not more than 8 ½ by 14 inches. For copies of public records in excess of the sizes listed in this section and for outside duplication services, the charge shall be equal to the actual cost of reproduction. Certified copies of public records shall be made available at a charge of one dollar ($1.00) per page. If the nature or volume of records requested requires extensive use of information technology resources or extensive clerical or supervisory assistance, the District may charge, in addition to the duplication charge, a special service charge that is based on the cost the District incurs to produce the records requested. This charge may include, but is not limited to, the cost of information technology resource, employee labor, and fees charged to the District by consultants employed in fulfilling the request. In cases where the special service charge is based in whole or in part on the costs incurred by the District due to employee labor, consultant fees, or other forms of labor, those portions of the charge shall be calculated based on the lowest labor cost of the individual(s) who is/are qualified to perform the labor, taking into account the nature or volume of the public records to be inspected or copied. The charge may include the labor costs of supervisory and/or clerical staff whose assistance is required to complete the records request, in accordance with Florida law. For purposes of this Rule, the word "extensive" shall mean that it will take more than 15 minutes to locate, review for confidential information, copy and re-file the requested material. In cases where extensive personnel time is determined by the District to be necessary to safeguard original records being inspected, the special service charge provided for in this section shall apply. If the total fees, including but not limited to special service charges, are anticipated to exceed twenty-five dollars ($25.00), then, prior to commencing work on the request, the District will inform the person making the public records request of the estimated cost, with the understanding that the final cost may vary from that estimate. If the person making the public records request decides to proceed with the request, payment of the estimated cost is required in advance. Should the person fail to pay the estimate, the District is under no duty to produce the requested records. After the request has been fulfilled, additional payments or credits may be due. The District is under no duty to produce records in response to future records requests if the person making the request owes the District for past unpaid duplication charges, special service charges, or other required payments or credits.

(5) Records Retention. The Secretary of the District shall be responsible for retaining the District's records in accordance with applicable Florida law.

(6) Policies. The Board may adopt policies related to the conduct of its business and the provision of services either by resolution or motion.

(7) Financial Disclosure Coordination. Unless specifically designated by Board resolution otherwise, the Secretary shall serve as the Financial Disclosure Coordinator ("Coordinator") for the District as required by the Florida Commission on Ethics ("Commission"). The Coordinator shall create, maintain and update a list of the names, e-mail addresses, physical addresses, and names of the agency of, and the office or position held by, all Supervisors and other persons required by Florida law to file a statement of financial interest due to his or her affiliation with the District ("Reporting Individual"). The Coordinator shall provide this list to the Commission by February 1 of each year, which list shall be current as of December 31 of the prior year. Each Supervisor and Reporting Individual shall promptly notify the Coordinator in writing if there are any changes to such person's name, e-mail address, or physical address. Each Supervisor and Reporting Individual shall promptly notify the Commission in the manner prescribed by the Commission if there are any changes to such person's e-mail address.

Specific Authority: §§ 190.011(5), 190.011(15), Fla. Stat.
Law Implemented: §§ 112.31446(3), 112.3145(8)(a)1., 119.07, 119.0701, 190.006, Fla. Stat.

Rule 1.3 Public Meetings, Hearings, and Workshops.

(1) Notice. Except in emergencies, or as otherwise required by statute or these Rules, at least seven (7) days' public notice shall be given of any public meeting, hearing or workshop of the Board. Public notice shall be given by publication in a newspaper of general circulation in the District and in the county in which the District is located. "General circulation" means a publication that is printed and published at least once a week for the preceding year, offering at least 25% of its words in the English language, qualifies as a periodicals material for postal purposes in the county in which the District is located, is for sale to the public generally, is available to the public generally for the publication of official or other notices, and is customarily containing information of a public character or of interest or of value to the residents or owners of property in the county where published, or of interest or of value to the general public. The annual meeting notice required to be published by Section 189.015 of the Florida Statutes, shall be published in a newspaper not of limited subject matter, which is published at least five days a week, unless the only newspaper in the county is published less than five days a week, and shall satisfy the requirement to give at least seven (7) days' public notice stated herein. Each Notice shall state, as applicable:

(a) The date, time and place of the meeting, hearing or workshop;

(b) A brief description of the nature, subjects, and purposes of the meeting, hearing, or workshop;

(c) The District office address for the submission of requests for copies of the agenda, as well as a contact name and telephone number for verbal requests for copies of the agenda; and

(d) The following or substantially similar language: "Pursuant to provisions of the Americans with Disabilities Act, any person requiring special accommodations to participate in this meeting/hearing/workshop is asked to advise the District Office at least forty-eight (48) hours before the meeting/hearing/workshop by contacting the District Manager at 1 (877) 276-0889. If you are hearing or speech impaired, please contact the Florida Relay Service at 1 (800) 955-8770 or 1 (800) 955-8771, who can aid you in contacting the District Office."

(e) The following or substantially similar language: "A person who decides to appeal any decision made at the meeting/hearing/workshop with respect to any matter considered at the meeting/hearing/workshop is advised that person will need a record of the proceedings and that accordingly, the person may need to ensure that a verbatim record of the proceedings is made including the testimony and evidence upon which the appeal is to be based."

(f) The following or substantially similar language: "The meeting [or hearing or workshop] may be continued in progress without additional notice to a time, date, and location stated on the record."

The date, time, and place of each meeting, hearing, or workshop of the Board shall additionally be posted on the District's website at least seven (7) days before each meeting, hearing, or workshop.

(2) Mistake. In the event that a meeting is held under the incorrect assumption that notice required by law and these Rules has been given, the Board at its next properly noticed meeting shall cure such defect by considering the agenda items from the prior meeting individually and anew.

(3) Agenda. The District Manager, under the guidance of District Counsel and the Chairperson or Vice-Chairperson, shall prepare an agenda of the meeting/hearing/workshop. The agenda and any meeting materials available in an electronic format, excluding any confidential and any confidential and exempt information, shall be available to the public at least seven days before the meeting/hearing/workshop, except in an emergency. Meeting materials shall be defined as, and limited to, the agenda, meeting minutes, resolutions, and agreements of the District that District staff deems necessary for Board approval. Inclusion of additional materials for Board consideration other than those defined herein as "meeting materials" shall not convert such materials into "meeting materials." For good cause, the agenda may be changed after it is first made available for distribution, and additional materials may be added or provided under separate cover at the meeting. The requirement of good cause shall be liberally construed to allow the District to efficiently conduct business and to avoid the expenses associated with special meetings.

The District may, but is not required to, use the following format in preparing its agenda for its regular meetings:

Call to order
Roll call
Public comment
Organizational matters
Review of minutes
Specific items of old business
Specific items of new business
Staff reports
- (a) District Counsel
- (b) District Engineer
- (c) District Manager
  1. Financial Report
  2. Approval of Expenditures

Supervisor's requests and comments
Public comment
Adjournment

(4) Minutes. The Secretary shall be responsible for preparing and keeping the minutes of each meeting of the Board. Minutes shall be corrected and approved by the Board at

a subsequent meeting. The Secretary may work with other staff members in preparing draft minutes for the Board's consideration.

(5) Special Requests. Persons wishing to receive, by mail, notices or agendas of meetings, may so advise the District Manager or Secretary at the District Office. Such persons shall furnish a mailing address in writing and shall be required to pre-pay the cost of the copying and postage.

(6) Emergency Meetings. The Chairperson, or Vice-Chairperson if the Chairperson is unavailable, upon consultation with the District Manager and District Counsel, if available, may convene an emergency meeting of the Board without first having complied with sections (1) and (3) of this Rule, to act on emergency matters that may affect the public health, safety, or welfare. Whenever possible, the District Manager shall make reasonable efforts to provide public notice and notify all Board members of an emergency meeting twenty-four (24) hours in advance. Reasonable efforts may include telephone notification. Notice of the emergency meeting must be provided both before and after the meeting on the District's website, if it has one. Whenever an emergency meeting is called, the District Manager shall be responsible for notifying at least one newspaper of general circulation in the District. After an emergency meeting, the Board shall publish in a newspaper of general circulation in the District, the time, date and place of the emergency meeting, the reasons why an emergency meeting was necessary, and a description of the action taken. Actions taken at an emergency meeting may be ratified by the Board at a regularly noticed meeting subsequently held.

(7) Public Comment. The Board shall set aside a reasonable amount of time at each meeting for public comment and members of the public shall be permitted to provide comment on any proposition before the Board. The portion of the meeting generally reserved for public comment shall be identified in the agenda. Policies governing public comment may be adopted by the Board in accordance with Florida law.

(8) Budget Hearing. Notice of hearing on the annual budget(s) shall be in accord with Section 190.008 of the Florida Statutes. Once adopted in accord with Section 190.008 of the Florida Statutes, the annual budget(s) may be amended from time to time by action of the Board. Approval of invoices by the Board in excess of the funds allocated to a particular budgeted line item shall serve to amend the budgeted line item.

(9) Public Hearings. Notice of required public hearings shall contain the information required by applicable Florida law and by these Rules applicable to meeting notices and shall be mailed and published as required by Florida law. The District Manager shall ensure that all such notices, whether mailed or published, contain the information required by Florida law and these Rules and are mailed and published as required by Florida law. Public hearings may be held during Board meetings when the agenda includes such public hearing.

(10) Participation by Teleconference/Videoconference. District staff may participate in Board meetings by teleconference or videoconference. Board members may also participate in Board meetings by teleconference or videoconference if in the good

judgment of the Board extraordinary circumstances exist; provided however, at least three Board members must be physically present at the meeting location to establish a quorum. Such extraordinary circumstances shall be presumed when a Board member participates by teleconference or videoconference, unless a majority of the Board members physically present determines that extraordinary circumstances do not exist.

(11) Board Authorization. The District has not adopted Robert's Rules of Order. For each agenda item, there shall be discussion permitted among the Board members during the meeting. Unless such procedure is waived by the Board, approval or disapproval of resolutions and other proposed Board actions shall be in the form of a motion by one Board member, a second by another Board member, and an affirmative vote by the majority of the Board members present. Any Board member, including the Chairperson, can make or second a motion.

(12) Continuances. Any meeting or public hearing of the Board may be continued without re-notice or re-advertising provided that:

(a) The Board identifies on the record at the original meeting a reasonable need for a continuance;

(b) The continuance is to a specified date, time, and location publicly announced at the original meeting; and

(c) The public notice for the original meeting states that the meeting may be continued to a date and time and states that the date, time, and location of any continuance shall be publicly announced at the original meeting and posted at the District Office immediately following the original meeting.

(13) Attorney-Client Sessions. An Attorney-Client Session is permitted when the District's attorneys deem it necessary to meet in private with the Board to discuss pending litigation to which the District is a party before a court or administrative agency or as may be authorized by law. The District's attorney must request such session at a public meeting. Prior to holding the Attorney-Client Session, the District must give reasonable public notice of the time and date of the session and the names of the persons anticipated to attend the session. The session must commence at an open meeting in which the Chairperson or Vice-Chairperson announces the commencement of the session, the estimated length of the session, and the names of the persons who will be attending the session. The discussion during the session is confined to settlement negotiations or strategy related to litigation expenses or as may be authorized by law. Only the Board, the District's attorneys (including outside counsel), the District Manager, and the court reporter may attend an Attorney-Client Session. During the session, no votes may be taken and no final decisions concerning settlement can be made. Upon the conclusion of the session, the public meeting is reopened, and the Chairperson or Vice-Chairperson must announce that the session has concluded. The session must be transcribed by a court-reporter and the transcript of the session filed with the District Secretary within a reasonable time after the session. The transcript shall not be available for public inspection until after the

conclusion of the litigation.

(14) Security and Firesafety Board Discussions. Portions of a meeting which relate to or would reveal a security or firesafety system plan or portion thereof made confidential and exempt by section 119.071(3)(a), Florida Statutes, are exempt from the public meeting requirements and other requirements of section 286.011, Florida Statutes, and section 24(b), Article 1 of the State Constitution. Should the Board wish to discuss such matters, members of the public shall be required to leave the meeting room during such discussion. Any records of the Board's discussion of such matters, including recordings or minutes, shall be maintained as confidential and exempt records in accordance with Florida law.

Specific Authority: §§ 190.011(5), 190.011(15), Fla. Stat.
Law Implemented: §§ 189.069(2)(a)16, 190.006, 190.007, 190.008, 286.0105, 286.011, 286.0113, 286.0114, Fla. Stat.

Rule 1.4 Internal Controls to Prevent Fraud, Waste and Abuse

(1) Internal Controls. The District shall establish and maintain internal controls designed to:

(a) Prevent and detect "fraud," "waste" and "abuse" as those terms are defined in section 11.45(1), Florida Statutes; and
(b) Promote and encourage compliance with applicable laws, rules contracts, grant agreements, and best practices; and
(c) Support economical and efficient operations; and
(d) Ensure reliability of financial records and reports; and
(e) Safeguard assets.

(2) Adoption. The internal controls to prevent fraud, waste and abuse shall be adopted and amended by the District in the same manner as District policies.

Specific Authority: §§ 190.011(5), 190.011(15), Fla. Stat.
Law Implemented: § 218.33(3), Fla. Stat.

Rule 2.0 Rulemaking Proceedings.

(1) Commencement of Proceedings. Proceedings held for adoption, amendment, or repeal of a District rule shall be conducted according to these Rules. Rulemaking proceedings shall be deemed to have been initiated upon publication of notice by the District. A "rule" is a District statement of general applicability that implements, interprets, or prescribes law or policy, or describes the procedure or practice requirements of the District ("Rule"). Nothing herein shall be construed as requiring the District to consider or adopt rules unless required by Chapter 190 of the Florida Statutes. Policies adopted by the District which do not consist of rates, fees, rentals or other monetary charges may be, but are not required to be, implemented through rulemaking proceedings.

(2) Notice of Rule Development.

(a) Except when the intended action is the repeal of a Rule, the District shall provide notice of the development of a proposed rule by publication of a Notice of Rule Development in a newspaper of general circulation in the District before providing notice of a proposed rule as required by section (3) of this Rule. Consequently, the Notice of Rule Development shall be published at least twenty-nine (29) days prior to the public hearing on the proposed Rule. The Notice of Rule Development shall indicate the subject area to be addressed by rule development, provide a short, plain explanation of the purpose and effect of the proposed rule, cite the specific legal authority for the proposed rule, and include a statement of how a person may promptly obtain, without cost, a copy of any preliminary draft, if available.

(b) All rules as drafted shall be consistent with Sections 120.54(1)(g) and 120.54(2)(b) of the Florida Statutes.

(3) Notice of Proceedings and Proposed Rules.

(a) Prior to the adoption, amendment, or repeal of any rule other than an emergency rule, the District shall give notice of its intended action, setting forth a short, plain explanation of the purpose and effect of the proposed action, a reference to the specific rulemaking authority pursuant to which the rule is adopted, and a reference to the section or subsection of the Florida Statutes being implemented, interpreted, or made specific. The notice shall include a summary of the District's statement of the estimated regulatory costs, if one has been prepared, based on the factors set forth in Section 120.541(2) of the Florida Statutes, and a statement that any person who wishes to provide the District with a lower cost regulatory alternative as provided by Section 120.541(1), must do so in writing within twenty-one (21) days after publication of the notice. The notice shall additionally include a statement that any affected person may request a public hearing by submitting a written request within twenty-one (21) days after the date of publication of the notice. Except when intended action is the repeal of a rule, the notice shall include a reference to both the date on which and the place

where the Notice of Rule Development required by section (2) of this Rule appeared.

(b) The notice shall be published in a newspaper of general circulation in the District and each county in which the District is located not less than twenty-eight (28) days prior to the intended action. The proposed rule shall be available for inspection and copying by the public at the time of the publication of notice.

(c) The notice shall be mailed to all persons named in the proposed rule and to all persons who, at least fourteen (14) days prior to such mailing, have made requests of the District for advance notice of its rulemaking proceedings. Any person may file a written request with the District Manager to receive notice by mail of District proceedings to adopt, amend, or repeal a rule. Such persons must furnish a mailing address and may be required to pay the cost of copying and mailing.

(4) Rule Development Workshops. Whenever requested in writing by any affected person, the District must either conduct a rule development workshop prior to proposing rules for adoption or the Chairperson must explain in writing why a workshop is unnecessary. The District may initiate a rule development workshop but is not required to do so.

(5) Petitions to Initiate Rulemaking. All Petitions to Initiate Rulemaking proceedings must contain the name, address, and telephone number of the petitioner, the specific action requested, the specific reason for adoption, amendment, or repeal, the date submitted, the text of the proposed rule, and the facts showing that the petitioner is regulated by the District or has a substantial interest in the rulemaking. Not later than sixty (60) calendar days following the date of filing a petition, the Board shall initiate rulemaking proceedings or deny the petition with a written statement of its reasons for the denial. If the petition is directed to an existing policy that the District has not formally adopted as a rule, the District may, in its discretion, notice and hold a public hearing on the petition to consider the comments of the public directed to the policy, its scope and application, and to consider whether the public interest is served adequately by the application of the policy on a case-by-case basis, as contrasted with its formal adoption as a rule. However, this section shall not be construed as requiring the District to adopt a rule to replace a policy.

(6) Rulemaking Materials. After the publication of the notice referenced in section (3) of this Rule, the Board shall make available for public inspection and shall provide, upon request and payment of the cost of copies, the following materials:

(a) The text of the proposed rule, or any amendment or repeal of any existing rules;

(b) A detailed written statement of the facts and circumstances justifying the proposed rule;

(c) A copy of the statement of estimated regulatory costs if required by Section 120.541 of the Florida Statutes; and

(d) The published notice.

(7) Hearing. The District may, or, upon the written request of any affected person received within twenty-one (21) days after the date of publication of the notice described in section (3) of this Rule, shall, provide a public hearing for the presentation of evidence, argument, and oral statements, within the reasonable conditions and limitations imposed by the District to avoid duplication, irrelevant comments, unnecessary delay, or disruption of the proceedings. The District shall publish notice of the public hearing in a newspaper of general circulation within the District either in the text of the notice described in section (3) of this Rule or in a separate publication at least seven (7) days before the scheduled public hearing. The notice shall specify the date, time, and location of the public hearing, and the name, address, and telephone number of the District contact person who can provide information about the public hearing. Written statements may be submitted by any person prior to or at the public hearing. All timely submitted written statements shall be considered by the District and made part of the rulemaking record.

(8) Emergency Rule Adoption. The Board may adopt an emergency rule if it finds that immediate danger to the public health, safety, or welfare exists which requires immediate action. Prior to the adoption of an emergency rule, the District Manager shall make reasonable efforts to notify a newspaper of general circulation in the District. Notice of emergency rules shall be published as soon as possible in a newspaper of general circulation in the District. The District may use any procedure which is fair under the circumstances in the adoption of an emergency rule as long as it protects the public interest as determined by the District and otherwise complies with these provisions.

(9) Negotiated Rulemaking. The District may use negotiated rulemaking in developing and adopting rules pursuant to Section 120.54(2)(d) of the Florida Statutes, except that any notices required under Section 120.54(2)(d) of the Florida Statutes, may be published in a newspaper of general circulation in the county in which the District is located.

(10) Rulemaking Record. In all rulemaking proceedings, the District shall compile and maintain a rulemaking record. The record shall include, if applicable:

(a) The texts of the proposed rule and the adopted rule;

(b) All notices given for a proposed rule;

(c) Any statement of estimated regulatory costs for the rule;

(d) A written summary of hearings, if any, on the proposed rule;

(e) All written comments received by the District and responses to those written comments; and

(f) All notices and findings pertaining to an emergency rule.

(11) Petitions to Challenge Existing Rules.

(a) Any person substantially affected by a rule may seek an administrative determination of the invalidity of the rule on the ground that the rule is an invalid exercise of the District's authority.

(b) The petition seeking an administrative determination must state with particularity the provisions alleged to be invalid with sufficient explanation of the facts or grounds for the alleged invalidity and facts sufficient to show that the person challenging a rule is substantially affected by it.

(c) The petition shall be filed with the District. Within 10 days after receiving the petition, the Chairperson shall, if the petition complies with the requirements of subsection (b) of this section, designate any member of the Board (including the Chairperson), District Manager, District Counsel, or other person as a hearing officer who shall conduct a hearing within 30 days thereafter, unless the petition is withdrawn or a continuance is granted by agreement of the parties. The failure of the District to follow the applicable rulemaking procedures or requirements in this Rule shall be presumed to be material; however, the District may rebut this presumption by showing that the substantial interests of the petitioner and the fairness of the proceedings have not been impaired.

(d) Within 30 days after the hearing, the hearing officer shall render a decision and state the reasons therefor in writing.

(e) Hearings held under this section shall be de novo in nature. The petitioner has a burden of proving by a preponderance of the evidence that the existing rule is an invalid exercise of District authority as to the objections raised. The hearing officer may:

(i) Administer oaths and affirmations;

(ii) Rule upon offers of proof and receive relevant evidence;

(iii) Regulate the course of the hearing, including any pre-hearing matters;

(iv) Enter orders; and

(v) Make or receive offers of settlement, stipulation, and adjustment.

(f) The petitioner and the District shall be adverse parties. Other substantially affected persons may join the proceedings as intervenors on appropriate terms which shall not unduly delay the proceedings.

(12) Variances and Waivers. A “variance” means a decision by the District to grant a modification to all or part of the literal requirements of a rule to a person who is subject to the rule. A “waiver” means a decision by the District not to apply all or part of a rule to a person who is subject to the rule. Variances and waivers from District rules may be granted subject to the following:

(a) Variances and waivers shall be granted when the person subject to the rule demonstrates that the purpose of the underlying statute will be or has been achieved by other means by the person, and when application of the rule would create a substantial hardship or would violate principles of fairness. For purposes of this section, "substantial hardship" means a demonstrated economic, technological, legal, or other type of hardship to the person requesting the variance or waiver. For purposes of this section, "principles of fairness" are violated when the literal application of a rule affects a particular person in a manner significantly different from the way it affects other similarly situated persons who are subject to the rule.

(b) A person who is subject to regulation by a District Rule may file a petition with the District, requesting a variance or waiver from the District’s Rule. Each petition shall specify:

(i) The rule from which a variance or waiver is requested;

(ii) The type of action requested;

(iii) The specific facts that would justify a waiver or variance for the petitioner; and

(iv) The reason why the variance or the waiver requested would serve the purposes of the underlying statute.

(c) The District shall review the petition and may request only that information needed to clarify the petition or to answer new questions raised by or directly related to the petition. If the petitioner asserts that any request for additional information is not authorized by law or by Rule of the District, the District shall proceed, at the petitioner’s written request, to process the petition.

(d) The Board shall grant or deny a petition for variance or waiver and shall announce such disposition at a publicly held meeting of the Board, within ninety (90) days after receipt of the original petition, the last item of timely requested additional material, or the petitioner's written request to finish processing the petition. The District’s statement granting or denying the petition shall contain a statement of the relevant facts and reasons supporting the District's action.

(13) Rates, Fees, Rentals and Other Charges. All rates, fees, rentals, or other charges shall be subject to rulemaking proceedings. Policies adopted by the District which do not consist of rates, fees, rentals or other charges may be, but are not required to be, implemented through rulemaking proceedings.

Specific Authority: §§ 190.011(5), 190.011(15), 190.035, Fla. Stat.
Law Implemented: §§ 190.011(5), 190.035(2), Fla. Stat.

Rule 3.0 Competitive Purchase.

(1) Purpose and Scope. In order to comply with Sections 190.033(1) through (3), 287.055 and 287.017 of the Florida Statutes, the following provisions shall apply to the purchase of Professional Services, insurance, construction contracts, design-build services, goods, supplies, and materials, Contractual Services, and maintenance services.

(2) Board Authorization. Except in cases of an Emergency Purchase, a competitive purchase governed by these Rules shall only be undertaken after authorization by the Board.

(3) Definitions.

(a) "Competitive Solicitation" means a formal, advertised procurement process, other than an Invitation to Bid, Request for Proposals, or Invitation to Negotiate, approved by the Board to purchase commodities and/or services which affords vendors fair treatment in the competition for award of a District purchase contract.

(b) "Continuing Contract" means a contract for Professional Services entered into in accordance with Section 287.055 of the Florida Statutes, between the District and a firm, whereby the firm provides Professional Services to the District for projects in which the costs do not exceed two million dollars ($2,000,000), for a study activity when the fee for such Professional Services to the District does not exceed two hundred thousand dollars ($200,000), or for work of a specified nature as outlined in the contract with the District, with no time limitation except that the contract must provide a termination clause (for example, a contract for general District engineering services). Firms providing Professional Services under Continuing Contracts shall not be required to bid against one another.

(c) "Contractual Service" means the rendering by a contractor of its time and effort rather than the furnishing of specific commodities. The term applies only to those services rendered by individuals and firms who are independent contractors. Contractual Services do not include auditing services, Maintenance Services, or Professional Services as defined in Section 287.055(2)(a) of the Florida Statutes, and these Rules. Contractual Services also do not include any contract for the furnishing of labor or materials for the construction, renovation, repair, modification, or demolition of any facility, building, portion of building, utility, park, parking lot, or structure or other improvement to real property entered into pursuant to Chapter 255 of the Florida Statutes, and Rules 3.5 or 3.6.

(d) "Design-Build Contract" means a single contract with a Design-Build Firm for the design and construction of a public construction project.

(e) "Design-Build Firm" means a partnership, corporation or other legal entity

that:

(i) Is certified under Section 489.119 of the Florida Statutes, to engage in contracting through a certified or registered general contractor or a certified or registered building contractor as the qualifying agent; or

(ii) Is certified under Section 471.023 of the Florida Statutes, to practice or to offer to practice engineering; certified under Section 481.219 of the Florida Statutes, to practice or to offer to practice architecture; or certified under Section 481.319 of the Florida Statutes, to practice or to offer to practice landscape architecture.

(f) "Design Criteria Package" means concise, performance-oriented drawings or specifications for a public construction project. The purpose of the Design Criteria Package is to furnish sufficient information to permit Design-Build Firms to prepare a bid or a response to the District's Request for Proposals, or to permit the District to enter into a negotiated Design-Build Contract. The Design Criteria Package must specify performance-based criteria for the public construction project, including the legal description of the site, survey information concerning the site, interior space requirements, material quality standards, schematic layouts and conceptual design criteria of the project, cost or budget estimates, design and construction schedules, site development requirements, provisions for utilities, stormwater retention and disposal, and parking requirements applicable to the project. Design Criteria Packages shall require firms to submit information regarding the qualifications, availability, and past work of the firms, including the partners and members thereof.

(g) "Design Criteria Professional" means a firm who holds a current certificate of registration under Chapter 481 of the Florida Statutes, to practice architecture or landscape architecture, or a firm who holds a current certificate as a registered engineer under Chapter 471 of the Florida Statutes, to practice engineering, and who is employed by or under contract to the District to provide professional architect services, landscape architect services, or engineering services in connection with the preparation of the Design Criteria Package.

(h) "Emergency Purchase" means a purchase necessitated by a sudden unexpected turn of events (for example, acts of God, riot, fires, floods, hurricanes, accidents, or any circumstances or cause beyond the control of the Board in the normal conduct of its business), where the Board finds that the delay incident to competitive purchase would be detrimental to the interests of the District. This includes, but is not limited to, instances where the time to competitively award the project will jeopardize the funding for the project, will materially increase the cost of the project, or will create an undue hardship on the public health, safety, or welfare.

(i) "Invitation to Bid" is a written solicitation for sealed bids with the title, date,

and hour of the public bid opening designated specifically and defining the commodity or service involved. It includes printed instructions prescribing conditions for bidding, qualification, evaluation criteria, and provides for a manual signature of an authorized representative. It may include one or more bid alternates.

(j) "Invitation to Negotiate" means a written solicitation for competitive sealed replies to select one or more vendors with which to commence negotiations for the procurement of commodities or services.

(k) "Negotiate" means to conduct legitimate, arm's length discussions and conferences to reach an agreement on a term or price.

(l) "Professional Services" means those services within the scope of the practice of architecture, professional engineering, landscape architecture, or registered surveying and mapping, as defined by the laws of Florida, or those services performed by any architect, professional engineer, landscape architect, or registered surveyor and mapper, in connection with the firm's or individual's professional employment or practice.

(m) "Proposal (or Reply or Response) Most Advantageous to the District" means, as determined in the sole discretion of the Board, the proposal, reply, or response that is:

(i) Submitted by a person or firm capable and qualified in all respects to perform fully the contract requirements, who has the integrity and reliability to assure good faith performance;

(ii) The most responsive to the Request for Proposals, Invitation to Negotiate, or Competitive Solicitation as determined by the Board; and

(iii) For a cost to the District deemed by the Board to be reasonable.

(n) "Purchase" means acquisition by sale, rent, lease, lease/purchase, or installment sale. It does not include transfer, sale, or exchange of goods, supplies, or materials between the District and any federal, state, regional or local governmental entity or political subdivision of the State of Florida.

(o) "Request for Proposals" or "RFP" is a written solicitation for sealed proposals with the title, date, and hour of the public opening designated and requiring the manual signature of an authorized representative. It may provide general information, applicable laws and rules, statement of work, functional or general specifications, qualifications, proposal instructions, work detail analysis, and evaluation criteria as necessary.

(p) "Responsive and Responsible Bidder" means an entity or individual that has submitted a bid that conforms in all material respects to the Invitation to Bid

and has the capability in all respects to fully perform the contract requirements and the integrity and reliability that will assure good faith performance. "Responsive and Responsible Vendor" means an entity or individual that has submitted a proposal, reply, or response that conforms in all material respects to the Request for Proposals, Invitation to Negotiate, or Competitive Solicitation and has the capability in all respects to fully perform the contract requirements and the integrity and reliability that will assure good faith performance. In determining whether an entity or individual is a Responsive and Responsible Bidder (or Vendor), the District may consider, in addition to factors described in the Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation, the following:

(i) The ability and adequacy of the professional personnel employed by the entity/individual;

(ii) The past performance of the entity/individual for the District and in other professional employment;

(iii) The willingness of the entity/individual to meet time and budget requirements;

(iv) The geographic location of the entity's/individual's headquarters or office in relation to the project;

(v) The recent, current, and projected workloads of the entity/individual;

(vi) The volume of work previously awarded to the entity/individual;

(vii) Whether the cost components of the bid or proposal are appropriately balanced; and

(viii) Whether the entity/individual is a certified minority business enterprise.

(q) "Responsive Bid," "Responsive Proposal," "Responsive Reply," and "Responsive Response" all mean a bid, proposal, reply, or response which conforms in all material respects to the specifications and conditions in the Invitation to Bid, Request for Proposals, Invitations to Negotiate, or Competitive Solicitation document and these Rules, and the cost components of which, if any, are appropriately balanced. A bid, proposal, reply or response is not responsive if the person or firm submitting it fails to meet any material requirement relating to the qualifications, financial stability, or licensing of the bidder.

Specific Authority: §§ 190.011(5), 190.011(15), Fla. Stat.
Law Implemented: §§ 190.033, 255.20, 287.055, Fla. Stat.

Rule 3.1 Procedure Under the Consultants' Competitive Negotiations Act.

(1) Scope. The following procedures are adopted for the selection of firms or individuals to provide Professional Services exceeding the thresholds herein described, for the negotiation of such contracts, and to provide for protest of actions of the Board under this Rule. As used in this Rule, "Project" means that fixed capital outlay study or planning activity when basic construction cost is estimated by the District to exceed the threshold amount provided in Section 287.017 of the Florida Statutes, for CATEGORY FIVE, or for a planning study activity when the fee for Professional Services is estimated by the District to exceed the threshold amount provided in Section 287.017 for CATEGORY TWO, as such categories may be amended or adjusted from time to time.

(2) Qualifying Procedures. In order to be eligible to provide Professional Services to the District, a consultant must, at the time of receipt of the firm's qualification submittal:

(a) Hold all required applicable state professional licenses in good standing;

(b) Hold all required applicable federal licenses in good standing, if any;

(c) Hold a current and active Florida corporate charter or be authorized to do business in the State of Florida in accordance with Chapter 607 of the Florida Statutes, if the consultant is a corporation; and

(d) Meet any qualification requirements set forth in the District's Request for Qualifications.

Evidence of compliance with this Rule may be submitted with the qualifications, if requested by the District. In addition, evidence of compliance must be submitted any time requested by the District.

(3) Public Announcement. Except in cases of valid public emergencies as certified by the Board, the District shall announce each occasion when Professional Services are required for a Project or a Continuing Contract by publishing a notice providing a general description of the Project, or the nature of the Continuing Contract, and the method for interested consultants to apply for consideration. The notice shall appear in at least one (1) newspaper of general circulation in the District and in such other places as the District deems appropriate. The notice must allow at least fourteen (14) days for submittal of qualifications from the date of publication. The District may maintain lists of consultants interested in receiving such notices. These consultants are encouraged to submit annually statements of qualifications and performance data. The District shall make reasonable efforts to provide copies of any notices to such consultants, but the failure to do so shall not give such consultants any bid protest or other rights or otherwise disqualify any otherwise valid procurement process. The Board has the right to reject any and all qualifications, and such reservation shall be included in the published notice. Consultants not receiving a contract award shall not be entitled to recover from the District any costs of qualification package preparation or submittal.

(4) Competitive Selection.

(a) The Board shall review and evaluate the data submitted in response to the notice described in section (3) of this Rule regarding qualifications and performance ability, as well as any statements of qualifications on file. The Board shall conduct discussions with, and may require public presentation by consultants regarding their qualifications, approach to the Project, and ability to furnish the required services. The Board shall then select and list the consultants, in order of preference, deemed to be the most highly capable and qualified to perform the required Professional Services, after considering these and other appropriate criteria:

(i) The ability and adequacy of the professional personnel employed by each consultant;

(ii) Whether a consultant is a certified minority business enterprise;

(iii) Each consultant's past performance;

(iv) The willingness of each consultant to meet time and budget requirements;

(v) The geographic location of each consultant's headquarters, office and personnel in relation to the project;

(vi) The recent, current, and projected workloads of each consultant; and

(vii) The volume of work previously awarded to each consultant by the District.

(b) Nothing in these Rules shall prevent the District from evaluating and eventually selecting a consultant if less than three (3) Responsive qualification packages, including packages indicating a desire not to provide Professional Services on a given Project, are received.

(c) If the selection process is administered by any person or committee other than the full Board, the selection made will be presented to the full Board with a recommendation that competitive negotiations be instituted with the selected firms in order of preference listed.

(d) Notice of the rankings adopted by the Board, including the rejection of some or all qualification packages, shall be provided in writing to all consultants by United States Mail, hand delivery, facsimile, or overnight delivery service. The notice shall include the following statement: "Failure to file a protest within the time prescribed in Rule 3.11 of the Rules of the District shall constitute a waiver of proceedings under those Rules," or wording to that effect. Protests

of the District's ranking decisions under this Rule shall be in accordance with the procedures set forth in Rule 3.11.

(5) Competitive Negotiation.

(a) After the Board has authorized the beginning of competitive negotiations, the District may begin such negotiations with the firm listed as most qualified to perform the required Professional Services at a rate or amount of compensation which the Board determines is fair, competitive, and reasonable.

(b) In negotiating a lump-sum or cost-plus-a-fixed-fee professional contract for more than the threshold amount provided in Section 287.017 of the Florida Statutes, for CATEGORY FOUR, the firm receiving the award shall be required to execute a truth-in-negotiation certificate stating that "wage rates and other factual unit costs supporting the compensation are accurate, complete and current at the time of contracting." In addition, any professional service contract under which such a certificate is required, shall contain a provision that "the original contract price and any additions thereto, shall be adjusted to exclude any significant sums by which the Board determines the contract price was increased due to inaccurate, incomplete, or noncurrent wage rates and other factual unit costs."

(c) Should the District be unable to negotiate a satisfactory agreement with the firm determined to be the most qualified at a price deemed by the District to be fair, competitive, and reasonable, then negotiations with that firm shall be terminated and the District shall immediately begin negotiations with the second most qualified firm. If a satisfactory agreement with the second firm cannot be reached, those negotiations shall be terminated and negotiations with the third most qualified firm shall be undertaken.

(d) Should the District be unable to negotiate a satisfactory agreement with one of the top three (3) ranked consultants, additional firms shall be selected by the District, in order of their competence and qualifications. Negotiations shall continue, beginning with the first-named firm on the list, until an agreement is reached or the list of firms is exhausted.

(6) Contracts; Public Records. In accordance with Florida law, each contract entered into pursuant to this Rule shall include provisions required by law that require the contractor to comply with public records laws.

(7) Continuing Contract. Nothing in this Rule shall prohibit a Continuing Contract between a consultant and the District.

(8) Emergency Purchase. The District may make an Emergency Purchase without complying with these Rules. The fact that an Emergency Purchase has occurred or is necessary shall be noted in the minutes of the next Board meeting.

Specific Authority: §§ 190.011(5), 190.011(15), Fla. Stat.
Law Implemented: §§ 119.0701, 190.011(3), 190.033, 287.055, Fla. Stat.

Rule 3.2 Procedure Regarding Auditor Selection.

In order to comply with the requirements of Section 218.391 of the Florida Statutes, the following procedures are outlined for selection of firms or individuals to provide Auditing Services and for the negotiation of such contracts. For audits required under Chapter 190 of the Florida Statutes but not meeting the thresholds of Chapter 218 of the Florida Statutes, the District need not follow these procedures but may proceed with the selection of a firm or individual to provide Auditing Services and for the negotiation of such contracts in the manner the Board determines is in the best interests of the District.

(1) Definitions.

(a) "Auditing Services" means those services within the scope of the practice of a certified public accounting firm licensed under Chapter 473 of the Florida Statutes, and qualified to conduct audits in accordance with government auditing standards as adopted by the Florida Board of Accountancy.

(b) "Committee" means the auditor selection committee appointed by the Board as described in section (2) of this Rule.

(2) Establishment of Auditor Selection Committee. Prior to a public announcement under section (4) of this Rule that Auditing Services are required, the Board shall establish an auditor selection committee ("Committee"), the primary purpose of which is to assist the Board in selecting an auditor to conduct the annual financial audit required by Section 218.39 of the Florida Statutes. The Committee shall include at least three individuals, at least one of which must also be a member of the Board. The establishment and selection of the Committee must be conducted at a publicly noticed and held meeting of the Board. The Chairperson of the Committee must be a member of the Board. An employee, a chief executive officer, or a chief financial officer of the District may not serve as a member of the Committee; provided however such individual may serve the Committee in an advisory capacity.

(3) Establishment of Minimum Qualifications and Evaluation Criteria. Prior to a public announcement under section (4) of this Rule that Auditing Services are required, the Committee shall meet at a publicly noticed meeting to establish minimum qualifications and factors to use for the evaluation of Auditing Services to be provided by a certified public accounting firm licensed under Chapter 473 of the Florida Statutes, and qualified to conduct audits in accordance with government auditing standards as adopted by the Florida Board of Accountancy.

(a) Minimum Qualifications. In order to be eligible to submit a proposal, a firm must, at all relevant times including the time of receipt of the proposal by the District:

(i) Hold all required applicable state professional licenses in good standing;

(ii) Hold all required applicable federal licenses in good standing, if any;

(iii) Hold a current and active Florida corporate charter or be authorized to do business in the State of Florida in accordance with Chapter 607 of the Florida Statutes, if the proposer is a corporation; and

(iv) Meet any pre-qualification requirements established by the Committee and set forth in the RFP or other specifications.

If requested in the RFP or other specifications, evidence of compliance with the minimum qualifications as established by the Committee must be submitted with the proposal.

(b) Evaluation Criteria. The factors established for the evaluation of Auditing Services by the Committee shall include, but are not limited to:

(i) Ability of personnel;

(ii) Experience;

(iii) Ability to furnish the required services; and

(iv) Such other factors as may be determined by the Committee to be applicable to its particular requirements.

The Committee may also choose to consider compensation as a factor. If the Committee establishes compensation as one of the factors, compensation shall not be the sole or predominant factor used to evaluate proposals.

(4) Public Announcement. After identifying the factors to be used in evaluating the proposals for Auditing Services as set forth in section (3) of this Rule, the Committee shall publicly announce the opportunity to provide Auditing Services. Such public announcement shall include a brief description of the audit and how interested firms can apply for consideration and obtain the RFP. The notice shall appear in at least one (1) newspaper of general circulation in the District and the county in which the District is located. The public announcement shall allow for at least seven (7) days for the submission of proposals.

(5) Request for Proposals. The Committee shall provide interested firms with a Request for Proposals ("RFP"). The RFP shall provide information on how proposals are to be evaluated and such other information the Committee determines is necessary for the firm to prepare a proposal. The RFP shall state the time and place for submitting proposals.

(6) Committee's Evaluation of Proposals and Recommendation. The Committee shall meet at a publicly held meeting that is publicly noticed for a reasonable time in advance of the meeting to evaluate all qualified proposals and may, as part of the evaluation, require that each interested firm provide a public presentation where the Committee may conduct discussions with the firm, and where the firm may present

information, regarding the firm's qualifications. At the public meeting, the Committee shall rank and recommend in order of preference no fewer than three firms deemed to be the most highly qualified to perform the required services after considering the factors established pursuant to subsection (3)(b) of this Rule. If fewer than three firms respond to the RFP or if no firms respond to the RFP, the Committee shall recommend such firm as it deems to be the most highly qualified. Notwithstanding the foregoing, the Committee may recommend that any and all proposals be rejected.

(7) Board Selection of Auditor.

(a) Where compensation was not selected as a factor used in evaluating the proposals, the Board shall negotiate with the firm ranked first and inquire of that firm as to the basis of compensation. If the Board is unable to negotiate a satisfactory agreement with the first ranked firm at a price deemed by the Board to be fair, competitive, and reasonable, then negotiations with that firm shall be terminated and the Board shall immediately begin negotiations with the second ranked firm. If a satisfactory agreement with the second ranked firm cannot be reached, those negotiations shall be terminated and negotiations with the third ranked firm shall be undertaken. The Board may reopen formal negotiations with any one of the three top-ranked firms, but it may not negotiate with more than one firm at a time. If the Board is unable to negotiate a satisfactory agreement with any of the selected firms, the Committee shall recommend additional firms in order of the firms' respective competence and qualifications. Negotiations shall continue, beginning with the first-named firm on the list, until an agreement is reached or the list of firms is exhausted.

(b) Where compensation was selected as a factor used in evaluating the proposals, the Board shall select the highest-ranked qualified firm or document in its public records the reason for not selecting the highest-ranked qualified firm.

(c) In negotiations with firms under this Rule, the Board may allow the District Manager, District Counsel, or other designee to conduct negotiations on its behalf.

(d) Notwithstanding the foregoing, the Board may reject any or all proposals. The Board shall not consider any proposal, or enter into any contract for Auditing Services, unless the proposed agreed-upon compensation is reasonable to satisfy the requirements of Section 218.39 of the Florida Statutes, and the needs of the District.

(8) Contract. Any agreement reached under this Rule shall be evidenced by a written contract, which may take the form of an engagement letter signed and executed by both parties. The written contract shall include all provisions and conditions of the procurement of such services and shall include, at a minimum, the following:

(a) A provision specifying the services to be provided and fees or other compensation for such services;

(b) A provision requiring that invoices for fees or other compensation be submitted in sufficient detail to demonstrate compliance with the terms of the contract;

(c) A provision setting forth deadlines for the auditor to submit a preliminary draft audit report to the District for review and to submit a final audit report no later than June 30 of the fiscal year that follows the fiscal year for which the audit is being conducted;

(d) A provision specifying the contract period, including renewals, and conditions under which the contract may be terminated or renewed. The maximum contract period including renewals shall be five (5) years. A renewal may be done without the use of the auditor selection procedures provided in this Rule but must be in writing.

(e) Provisions required by law that require the auditor to comply with public records laws.

(9) Notice of Award. Once a negotiated agreement with a firm or individual is reached, or the Board authorizes the execution of an agreement with a firm where compensation was a factor in the evaluation of proposals, notice of the intent to award, including the rejection of some or all proposals, shall be provided in writing to all proposers by United States Mail, hand delivery, facsimile, or overnight delivery service. The notice shall include the following statement: "Failure to file a protest within the time prescribed in Rule 3.11 of the Rules of the District shall constitute a waiver of proceedings under those Rules," or wording to that effect. Protests regarding the award of contracts under this Rule shall be as provided for in Rule 3.11. No proposer shall be entitled to recover any costs of proposal preparation or submittal from the District.

Specific Authority: §§ 190.011(5), 190.011(15), Fla. Stat.
Law Implemented: §§ 119.0701, 218.33, 218.391, Fla. Stat.

Rule 3.3 Purchase of Insurance.

(1) Scope. The purchases of life, health, accident, hospitalization, legal expense, or annuity insurance, or all of any kinds of such insurance for the officers and employees of the District, and for health, accident, hospitalization, and legal expenses upon a group insurance plan by the District, shall be governed by this Rule. This Rule does not apply to the purchase of any other type of insurance by the District, including but not limited to liability insurance, property insurance, and directors and officers insurance. Nothing in this Rule shall require the District to purchase insurance.

(2) Procedure. For a purchase of insurance within the scope of these Rules, the following procedure shall be followed:

(a) The Board shall cause to be prepared a Notice of Invitation to Bid.

(b) Notice of the Invitation to Bid shall be advertised at least once in a newspaper of general circulation within the District. The notice shall allow at least fourteen (14) days for submittal of bids.

(c) The District may maintain a list of persons interested in receiving notices of Invitations to Bid. The District shall make reasonable efforts to provide copies of any notices to such persons, but the failure to do so shall not give such consultants any bid protest or other rights or otherwise disqualify any otherwise valid procurement process.

(d) Bids shall be opened at the time and place noted in the Invitation to Bid.

(e) If only one (1) response to an Invitation is received, the District may proceed with the purchase. If no response to an Invitation to Bid is received, the District may take whatever steps are reasonably necessary in order to proceed with the purchase.

(f) The Board has the right to reject any and all bids and such reservations shall be included in all solicitations and advertisements.

(g) Simultaneously with the review of the submitted bids, the District may undertake negotiations with those companies that have submitted reasonable and timely bids and, in the opinion of the District, are fully qualified and capable of meeting all services and requirements. Bid responses shall be evaluated in accordance with the specifications and criteria contained in the Invitation to Bid; in addition, the total cost to the District, the cost, if any, to the District officers, employees, or their dependents, the geographic location of the company's headquarters and offices in relation to the District, and the ability of the company to guarantee premium stability may be considered. A contract to purchase insurance shall be awarded to that company whose response to the Invitation to Bid best meets the overall needs of the District, its officers, employees, and/or dependents.

(h) Notice of the intent to award, including rejection of some or all bids, shall be provided in writing to all bidders by United States Mail, by hand delivery, or by overnight delivery service. The notice shall include the following statement: "Failure to file a protest within the time prescribed in Rule 3.11 of the Rules of the District shall constitute a waiver of proceedings under those Rules," or wording to that effect. Protests of the District's procurement of insurance under this Rule shall be in accordance with the procedures set forth in Rule 3.11.

Specific Authority: §§ 190.011(5), 190.011(15), Fla. Stat.
Law Implemented: § 112.08, Fla. Stat.

Rule 3.4 Pre-qualification

(1) Scope. In its discretion, the District may undertake a pre-qualification process in accordance with this Rule for vendors to provide construction services, goods, supplies, and materials, Contractual Services, and maintenance services.

(2) Procedure. When the District seeks to pre-qualify vendors, the following procedures shall apply:

(a) The Board shall cause to be prepared a Request for Qualifications.

(b) For construction services exceeding the thresholds described in Section 255.20 of the Florida Statutes, the Board must advertise the proposed pre-qualification criteria and procedures and allow at least seven (7) days notice of the public hearing for comments on such pre-qualification criteria and procedures. At such public hearing, potential vendors may object to such pre-qualification criteria and procedures. Following such public hearing, the Board shall formally adopt pre-qualification criteria and procedures prior to the advertisement of the Request for Qualifications for construction services.

(c) The Request for Qualifications shall be advertised at least once in a newspaper of general circulation within the District and within the county in which the District is located. The notice shall allow at least seven (7) days for submittal of qualifications for goods, supplies and materials, Contractual Services, maintenance services, and construction services under two hundred fifty thousand dollars ($250,000). The notice shall allow at least twenty-one (21) days for submittal of qualifications for construction services estimated to cost over two hundred fifty thousand dollars ($250,000) and thirty (30) days for construction services estimated to cost over five hundred thousand dollars ($500,000).

(d) The District may maintain lists of persons interested in receiving notices of Requests for Qualifications. The District shall make a good faith effort to provide written notice, by electronic mail, United States Mail, hand delivery, or facsimile, to persons who provide their name and address to the District Manager for inclusion on the list. However, failure of a person to receive the notice shall not invalidate any pre-qualification determination or contract awarded in accordance with these Rules and shall not be a basis for a protest of any pre-qualification determination or contract award.

(e) If the District has pre-qualified vendors for a particular category of purchase, at the option of the District, only those persons who have been pre-qualified will be eligible to submit bids, proposals, replies or responses in response to the applicable Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation.

(f) In order to be eligible to submit qualifications, a firm or individual must, at the time of receipt of the qualifications:

(i) Hold all required applicable state professional licenses in good standing;

(ii) Hold all required applicable federal licenses in good standing, if any;

(iii) Hold a current and active Florida corporate charter or be authorized to do business in the State of Florida in accordance with Chapter 607 of the Florida Statutes, if the vendor is a corporation; and

(iv) Meet any special pre-qualification requirements set forth in the Request for Qualifications.

Evidence of compliance with these Rules must be submitted with the qualifications if required by the District. Failure to submit evidence of compliance when required may be grounds for rejection of the qualifications.

(g) Qualifications shall be presented to the Board, or a committee appointed by the Board, for evaluation in accordance with the Request for Qualifications and this Rule. Minor variations in the qualifications may be waived by the Board. A variation is minor if waiver of the variation does not create a competitive advantage or disadvantage of a material nature.

(h) All vendors determined by the District to meet the pre-qualification requirements shall be pre-qualified. To assure full understanding of the responsiveness to the requirements contained in a Request for Qualifications, discussions may be conducted with qualified vendors. Vendors shall be accorded fair treatment prior to the submittal date with respect to any opportunity for discussion and revision of qualifications. For construction services, any contractor pre-qualified and considered eligible by the Department of Transportation to bid to perform the type of work the project entails shall be presumed to be qualified to perform the project.

(i) The Board shall have the right to reject all qualifications if there are not enough to be competitive or if rejection is determined to be in the best interest of the District. No vendor shall be entitled to recover any costs of qualification preparation or submittal from the District.

(j) Notice of intent to pre-qualify, including rejection of some or all qualifications, shall be provided in writing to all vendors by United States Mail, electronic mail, hand delivery, facsimile, or overnight delivery service. The notice shall include the following statement: "Failure to file a protest within the time prescribed in Rule 3.11 of the Rules of the District shall constitute a waiver of proceedings under those Rules," or wording to that effect. Protests of the District's pre-qualification decisions under this Rule shall be in accordance with the procedures set forth in Rule 3.11; provided however, protests related to the pre-qualification criteria and procedures for construction services shall be resolved in accordance with section (2)(b) of this Rule and Section 255.20(1)(b) of the Florida Statutes.

(3) Suspension, Revocation, or Denial of Qualification

(a) The District, for good cause, may deny, suspend, or revoke a prequalified vendor's pre-qualified status. A suspension, revocation, or denial for good cause shall prohibit the vendor from bidding on any District construction contract for which qualification is required, shall constitute a determination of non-responsibility to bid on any other District construction or maintenance contract, and shall prohibit the vendor from acting as a material supplier or subcontractor on any District contract or project during the period of suspension, revocation, or denial. Good cause shall include the following:

i. One of the circumstances specified under Section 337.16(2), Fla. Stat., has occurred.

ii. Affiliated contractors submitted more than one proposal for the same work. In this event the pre-qualified status of all of the affiliated bidders will be revoked, suspended, or denied. All bids of affiliated bidders will be rejected.

iii. The vendor made or submitted false, deceptive, or fraudulent statements, certifications, or materials in any claim for payment or any information required by any District contract.

iv. The vendor or its affiliate defaulted on any contract or a contract surety assumed control of financial responsibility for any contract of the vendor.

v. The vendor's qualification to bid is suspended, revoked, or denied by any other public or semi-public entity, or the vendor has been the subject of a civil enforcement proceeding or settlement involving a public or semi-public entity.

vi. The vendor failed to comply with contract or warranty requirements or failed to follow District direction in the performance of a contract.

vii. The vendor failed to timely furnish all contract documents required by the contract specifications, special provisions, or by any state or federal statutes or regulations. If the vendor fails to furnish any of the subject contract documents by the expiration of the period of suspension, revocation, or denial set forth above, the vendor's pre-qualified status shall remain suspended, revoked, or denied until the documents are furnished.

viii. The vendor failed to notify the District within 10 days of the vendor, or any of its affiliates, being declared in default or otherwise not completing work on a contract or being suspended from qualification to bid or denied qualification to bid by any other public or semi-public agency.

ix. The vendor did not pay its subcontractors or suppliers in a timely manner or in compliance with contract documents.

x. The vendor has demonstrated instances of poor or unsatisfactory performance, deficient management resulting in project delay, poor quality workmanship, a history of payment of liquidated damages, untimely completion of projects, uncooperative attitude, contract litigation, inflated claims or defaults.

xi. An affiliate of the vendor has previously been determined by the District to be non-responsible, and the specified period of suspension, revocation, denial, or non-responsibility remains in effect.

xii. The vendor or affiliate(s) has been convicted of a contract crime.

1. The term "contract crime" means any violation of state or federal antitrust laws with respect to a public contract or any violation of any state or federal law involving fraud, bribery, collusion, conspiracy, or material misrepresentation with respect to a public contract.

2. The term "convicted" or "conviction" means a finding of guilt or a conviction of a contract crime, with or without an adjudication of guilt, in any federal or state trial court of record as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.

(b) A denial, suspension, or revocation shall prohibit the vendor from being a subcontractor on District work during the period of denial, suspension, or revocation, except when a prime contractor's bid has used prices of a subcontractor who becomes disqualified after the bid, but before the request for authorization to sublet is presented.

(c) The District shall inform the vendor in writing of its intent to deny, suspend, or revoke its pre-qualified status and inform the vendor of its right to a hearing, the procedure which must be followed, and the applicable time limits. If a hearing is requested within 10 days after the receipt of the notice of intent, the hearing shall be held within 30 days after receipt by the District of the request for the hearing. The decision shall be issued within 15 days after the hearing.

(d) Such suspension or revocation shall not affect the vendor's obligations under any preexisting contract.

(e) In the case of contract crimes, the vendor's pre-qualified status under this Rule shall be revoked indefinitely. For all violations of Rule 3.4(3)(a) other than for the vendor's conviction for contract crimes, the revocation, denial, or suspension of a vendor's pre-qualified status under this Rule shall be for a specific period of time based on the seriousness of the deficiency.

Examples of factors affecting the seriousness of a deficiency are:

i. Impacts on project schedule, cost, or quality of work;

ii. Unsafe conditions allowed to exist;

iii. Complaints from the public;

iv. Delay or interference with the bidding process;

v. The potential for repetition;

vi. Integrity of the public contracting process;

vii. Effect on the health, safety, and welfare of the public.

Specific Authority: §§ 190.011(5), 190.011(15), Fla. Stat.
Law Implemented: §§ 190.033, 255.0525, 255.20, Fla. Stat.

Rule 3.5 Construction Contracts, Not Design-Build.

(1) Scope. All contracts for the construction or improvement of any building, structure, or other public construction works authorized by Chapter 190 of the Florida Statutes, the costs of which are estimated by the District in accordance with generally accepted cost accounting principles to be in excess of the threshold amount for applicability of Section 255.20 of the Florida Statutes, as that amount may be indexed or amended from time to time, shall be let under the terms of these Rules and the procedures of Section 255.20 of the Florida Statutes, as the same may be amended from time to time. A project shall not be divided solely to avoid the threshold bidding requirements.

(2) Procedure. When a purchase of construction services is within the scope of this Rule, the following procedures shall apply:

(a) The Board shall cause to be prepared an Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation.

(b) Notice of the Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation shall be advertised at least once in a newspaper of general circulation in the District and in the county in which the District is located. The notice shall also include the amount of the bid bond, if one is required. The notice shall allow at least twenty-one (21) days for submittal of sealed bids, proposals, replies, or responses, unless the Board, for good cause, determines a shorter period of time is appropriate. Any project projected to cost more than five hundred thousand dollars ($500,000) must be noticed at least thirty (30) days prior to the date for submittal of bids, proposals, replies, or responses. If the Board has previously pre-qualified contractors pursuant to Rule 3.4 and determined that only the contractors that have been pre-qualified will be permitted to submit bids, proposals, replies, and responses, the Notice of Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation need not be published. Instead, the Notice of Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation shall be sent to the pre-qualified contractors by United States Mail, hand delivery, facsimile, or overnight delivery service.

(c) The District may maintain lists of persons interested in receiving notices of Invitations to Bid, Requests for Proposals, Invitations to Negotiate, and Competitive Solicitations. The District shall make a good faith effort to provide written notice, by electronic mail, United States Mail, hand delivery, or facsimile, to persons who provide their name and address to the District Manager for inclusion on the list. However, failure of a person to receive the notice shall not invalidate any contract awarded in accordance with this Rule and shall not be a basis for a protest of any contract award.

(d) If the District has pre-qualified providers of construction services, then, at the option of the District, only those persons who have been pre-qualified will be eligible to submit bids, proposals, replies, or responses to Invitations to Bid,

Requests for Proposals, Invitations to Negotiate, and Competitive Solicitations.

(e) In order to be eligible to submit a bid, proposal, reply, or response, a firm or individual must, at the time of receipt of the bids, proposals, replies, or responses:

(i) Hold all required applicable state professional licenses in good standing;

(ii) Hold all required applicable federal licenses in good standing, if any;

(iii) Hold a current and active Florida corporate charter or be authorized to do business in the State of Florida in accordance with Chapter 607 of the Florida Statutes, if the bidder is a corporation; and

(iv) Meet any special pre-qualification requirements set forth in the Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation.

Any contractor that has been found guilty by a court of any violation of federal labor or employment tax laws regarding subjects including but not limited to, reemployment assistance, safety, tax withholding, worker's compensation, unemployment tax, social security and Medicare tax, wage or hour, or prevailing rate laws within the past 5 years may be considered ineligible by the District to submit a bid, response, or proposal for a District project.

Evidence of compliance with these Rules must be submitted with the bid, proposal, reply, or response, if required by the District. Failure to submit evidence of compliance when required may be grounds for rejection of the bid, proposal, reply, or response.

(f) Bids, proposals, replies, and responses, or the portions of which that include the price, shall be publicly opened at a meeting noticed in accordance with Rule 1.3, and at which at least one district representative is present. The name of each bidder and the price submitted in the bid shall be announced at such meeting and shall be made available upon request. Minutes should be taken at the meeting and maintained by the District. Bids, proposals, replies, and responses shall be evaluated in accordance with the respective Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation and these Rules. Minor variations in the bids, proposals, replies, or responses may be waived by the Board. A variation is minor if waiver of the variation does not create a competitive advantage or disadvantage of a material nature. Mistakes in arithmetic extension of pricing may be corrected by the Board. Bids and proposals may not be modified or supplemented after opening; provided however, additional information may be requested and/or provided to evidence compliance, make non-material modifications,

clarifications, or supplementations, and as otherwise permitted by Florida law.

(g) The lowest Responsive Bid submitted by a Responsive and Responsible Bidder in response to an Invitation to Bid shall be accepted. In relation to a Request for Proposals, Invitation to Negotiate, or Competitive Solicitation, the Board shall select the Responsive Proposal, Reply, or Response submitted by a Responsive and Responsible Vendor which is most advantageous to the District. To assure full understanding of the responsiveness to the solicitation requirements contained in a Request for Proposals, Invitation to Negotiate, or Competitive Solicitation, discussions may be conducted with qualified vendors. Vendors shall be accorded fair treatment prior to the submittal date with respect to any opportunity for discussion, preparation, and revision of bids, proposals, replies, and responses.

(h) The Board shall have the right to reject all bids, proposals, replies, or responses because they exceed the amount of funds budgeted for the purchase, if there are not enough to be competitive, or if rejection is determined to be in the best interest of the District. No contractor shall be entitled to recover any costs of bid, proposal, response, or reply preparation or submittal from the District.

(i) The Board may require potential contractors to furnish bid bonds, performance bonds, and/or other bonds with a responsible surety to be approved by the Board.

(j) Notice of intent to award, including rejection of some or all bids, proposals, replies, or responses, shall be provided in writing to all contractors by United States Mail, hand delivery, facsimile, or overnight delivery service. The notice shall include the following statement: "Failure to file a protest within the time prescribed in Rule 3.11 of the Rules of the District shall constitute a waiver of proceedings under those Rules," or wording to that effect. Protests of the District's purchase of construction services under this Rule shall be in accordance with the procedures set forth in Rule 3.11.

(k) If less than three (3) Responsive Bids, Proposals, Replies, or Responses are received, the District may purchase construction services or may reject the bids, proposals, replies, or responses for a lack of competitiveness. If no Responsive Bid, Proposal, Reply, or Response is received, the District may proceed with the procurement of construction services, in the manner the Board determines is in the best interests of the District, which may include but is not limited to a direct purchase of the construction services without further competitive selection processes.

(3) <u>Sole Source; Government.</u> Construction services that are only available from a single source are exempt from this Rule. Construction services provided by governmental agencies are exempt from this Rule. This Rule shall not apply to the purchase of construction services, which may include goods, supplies, or materials, that are

purchased under a federal, state, or local government contract that has been competitively procured by such federal, state, or local government in a manner consistent with the material procurement requirements of these Rules. A contract for construction services is exempt from this Rule if state or federal law prescribes with whom the District must contract or if the rate of payment is established during the appropriation process.

(4) Contracts; Public Records. In accordance with Florida law, each contract entered into pursuant to this Rule shall include provisions required by law that require the contractor to comply with public records laws.

(5) Emergency Purchases. The District may make an Emergency Purchase without complying with these rules. The fact that an Emergency Purchase has occurred or is necessary shall be noted in the minutes of the next Board Meeting.

(6) Exceptions. This Rule is inapplicable when:

(a) The project is undertaken as repair or maintenance of an existing public facility;

(b) The funding source of the project will be diminished or lost because the time required to competitively award the project after the funds become available exceeds the time within which the funding source must be spent;

(c) The District has competitively awarded a project and the contractor has abandoned the project or the District has terminated the contract; or

(d) The District, after public notice, conducts a public meeting under Section 286.011 of the Florida Statutes, and finds by a majority vote of the Board that it is in the public's best interest to perform the project using its own services, employees, and equipment.

Specific Authority: §§ 190.011(5), 190.011(15), Fla. Stat.
Law Implemented: §§ 119.0701, 189.053, 190.033, 255.0518, 255.0525, 255.20, 287.055, Fla. Stat.

Rule 3.6 Construction Contracts, Design-Build.

(1) Scope. The District may utilize Design-Build Contracts for any public construction project for which the Board determines that use of such contract is in the best interest of the District. When letting a Design-Build Contract, the District shall use the following procedure:

(2) Procedure.

(a) The District shall utilize a Design Criteria Professional meeting the requirements of Section 287.055(2)(k) of the Florida Statutes, when developing a Design Criteria Package, evaluating the proposals and qualifications submitted by Design-Build Firms, and determining compliance of the project construction with the Design Criteria Package. The Design

Criteria Professional may be an employee of the District, may be the District Engineer selected by the District pursuant to Section 287.055 of the Florida Statutes, or may be retained pursuant to Rule 3.1. The Design Criteria Professional is not eligible to render services under a Design-Build Contract executed pursuant to the Design Criteria Package.

(b) A Design Criteria Package for the construction project shall be prepared and sealed by the Design Criteria Professional. If the project utilizes existing plans, the Design Criteria Professional shall create a Design Criteria Package by supplementing the plans with project specific requirements, if any.

(c) The Board may either choose to award the Design-Build Contract pursuant to the competitive proposal selection process set forth in Section 287.055(9) of the Florida Statutes, or pursuant to the qualifications-based selection process pursuant to Rule 3.1.

(i) Qualifications-Based Selection. If the process set forth in Rule 3.1 is utilized, subsequent to competitive negotiations, a guaranteed maximum price and guaranteed completion date shall be established.

(ii) Competitive Proposal-Based Selection. If the competitive proposal selection process is utilized, the Board, in consultation with the Design Criteria Professional, shall establish the criteria, standards and procedures for the evaluation of Design-Build Proposals based on price, technical, and design aspects of the project, weighted for the project. After a Design Criteria Package and the standards and procedures for evaluation of proposals have been developed, competitive proposals from qualified firms shall be solicited pursuant to the design criteria by the following procedure:

1. A Request for Proposals shall be advertised at least once in a newspaper of general circulation in the county in which the District is located. The notice shall allow at least twenty-one (21) days for submittal of sealed proposals, unless the Board, for good cause, determines a shorter period of time is appropriate. Any project projected to cost more than five hundred thousand dollars ($500,000) must be noticed at least thirty (30) days prior to the date for submittal of proposals.

2. The District may maintain lists of persons interested in receiving notices of Requests for Proposals. The District shall make a good faith effort to provide written notice, by electronic mail, United States Mail, hand delivery, or facsimile, to persons who provide their name and address to the District Manager for inclusion on the list. However, failure of a person to receive the notice shall not invalidate any contract awarded in accordance with this Rule and shall not be a basis for a protest of any contract award.

3. In order to be eligible to submit a proposal, a firm must, at the time of receipt of the proposals:

   a. Hold the required applicable state professional licenses in good standing, as defined by Section 287.055(2)(h) of the Florida Statutes;

   b. Hold all required applicable federal licenses in good standing, if any;

   c. Hold a current and active Florida corporate charter or be authorized to do business in the State of Florida in accordance with Chapter 607 of the Florida Statutes, if the proposer is a corporation;

   d. Meet any special pre-qualification requirements set forth in the Request for Proposals and Design Criteria Package.

   Any contractor that has been found guilty by a court of any violation of federal labor or employment tax laws regarding subjects including but not limited to reemployment assistance, safety, tax withholding, worker's compensation, unemployment tax, social security and Medicare tax, wage or hour, or prevailing rate laws within the past 5 years may be considered ineligible by the District to submit a bid, response, or proposal for a District project.

   Evidence of compliance with these Rules must be submitted with the proposal if required by the District. Failure to submit evidence of compliance when required may be grounds for rejection of the proposal.

4. The proposals, or the portions of which that include the price, shall be publicly opened at a meeting noticed in accordance with Rule 1.3, and at which at least one district representative is present. The name of each bidder and the price submitted in the bid shall be announced at such meeting and shall be made available upon request. Minutes should be taken at the meeting and maintained by the District. In consultation with the Design Criteria Professional, the Board shall evaluate the proposals received based on evaluation criteria and procedures established prior to the solicitation of proposals, including but not limited to qualifications, availability, and past work of the firms and the partners and members thereof. The Board shall then select no fewer than three (3) Design-Build Firms as the most qualified.

5. The Board shall have the right to reject all proposals if the proposals are too high, or rejection is determined to be in the best interest of the District. No vendor shall be entitled to recover any costs of proposal preparation or submittal from the District.

6. If less than three (3) Responsive Proposals are received, the District may purchase design-build services or may reject the proposals for lack of competitiveness. If no Responsive Proposals are received, the District may proceed with the procurement of design-build services in the manner the Board determines is in the best interests of the District, which may include but is not limited to a direct purchase of the design-build services without further competitive selection processes.

7. Notice of the rankings adopted by the Board, including the rejection of some or all proposals, shall be provided in writing to all consultants by United States Mail, hand delivery, facsimile, or overnight delivery service. The notice shall include the following statement: "Failure to file a protest within the time prescribed in Rule 3.11 of the Rules of the District shall constitute a waiver of proceedings under those Rules," or wording to that effect. Protests of the District's rankings under this Rule shall be in accordance with the procedures set forth in Rule 3.11.

8. The Board shall negotiate a contract with the firm ranking the highest based on the evaluation standards and shall establish a price which the Board determines is fair, competitive and reasonable. Should the Board be unable to negotiate a satisfactory contract with the firm considered to be the most qualified at a price considered by the Board to be fair, competitive, and reasonable, negotiations with that firm must be terminated. The Board shall then undertake negotiations with the second most qualified firm, based on the ranking by the evaluation standards. Should the Board be unable to negotiate a satisfactory contract with the firm considered to be the second most qualified at a price considered by the Board to be fair, competitive, and reasonable, negotiations with that firm must be terminated. The Board shall then undertake negotiations with the third most qualified firm. Should the Board be unable to negotiate a satisfactory contract with the firm considered to be the third most qualified at a price considered by the Board to be fair, competitive, and reasonable, negotiations with that firm must be terminated. Should the Board be unable to negotiate a

satisfactory contract with any of the selected firms, the Board shall select additional firms in order of their rankings based on the evaluation standards and continue negotiations until an agreement is reached or the list of firms is exhausted.

9. After the Board contracts with a firm, the firm shall bring to the Board for approval, detailed working drawings of the project.

10. The Design Criteria Professional shall evaluate the compliance of the detailed working drawings and project construction with the Design Criteria Package and shall provide the Board with a report of the same.

(3) Contracts; Public Records. In accordance with Florida law, each contract entered into pursuant to this Rule shall include provisions required by law that require the contractor to comply with public records laws.

(4) Emergency Purchase. The Board may, in case of public emergency, declare an emergency and immediately proceed with negotiations with the best qualified Design-Build Firm available at the time. The fact that an Emergency Purchase has occurred shall be noted in the minutes of the next Board meeting.

(5) Exceptions. This Rule is inapplicable when:

(a) The project is undertaken as repair or maintenance of an existing public facility;

(b) The funding source of the project will be diminished or lost because the time required to competitively award the project after the funds become available exceeds the time within which the funding source must be spent;

(c) The District has competitively awarded a project and the contractor has abandoned the project or the District has terminated the contractor; or

(d) The District, after public notice, conducts a public meeting under Section 286.011 of the Florida Statutes, and finds by a majority vote of the Board that it is in the public's best interest to perform the project using its own services, employees, and equipment.

Specific Authority: §§ 190.011(5), 190.011(15), Fla. Stat.
Law Implemented: §§ 119.0701, 189.053, 190.033, 255.0518, 255.0525, 255.20, 287.055, Fla. Stat.

Rule 3.7 Payment and Performance Bonds.

(1) Scope. This Rule shall apply to contracts for the construction of a public building, for the prosecution and completion of a public work, or for repairs upon a public building or public work and shall be construed in addition to terms prescribed by any other Rule that may also apply to such contracts.

(2) Required Bond. Upon entering into a contract for any of the services described in section (1) of this Rule in excess of $200,000, the Board should require that the contractor, before commencing the work, execute and record a payment and performance bond in an amount equal to the contract price. Notwithstanding the terms of the contract or any other law, the District may not make payment to the contractor until the contractor has provided to the District a certified copy of the recorded bond.

(3) Discretionary Bond. At the discretion of the Board, upon entering into a contract for any of the services described in section (1) of this Rule for an amount not exceeding $200,000, the contractor may be exempted from executing a payment and performance bond.

Specific Authority: §§ 190.011(5), 190.011(15), Fla. Stat.
Law Implemented: § 255.05, Fla. Stat.

Rule 3.8 Goods, Supplies, and Materials.

(1) Purpose and Scope. All purchases of goods, supplies, or materials exceeding the amount provided in Section 287.017 of the Florida Statutes, for CATEGORY FOUR, shall be purchased under the terms of this Rule. Contracts for purchases of "goods, supplies, and materials" do not include printing, insurance, advertising, or legal notices. A contract involving goods, supplies, or materials plus maintenance services may, in the discretion of the Board, be treated as a contract for maintenance services. However, a purchase shall not be divided solely in order to avoid the threshold bidding requirements.

(2) Procedure. When a purchase of goods, supplies, or materials is within the scope of this Rule, the following procedures shall apply:

(a) The Board shall cause to be prepared an Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation.

(b) Notice of the Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation shall be advertised at least once in a newspaper of general circulation within the District and within the county in which the District is located. The notice shall also include the amount of the bid bond, if one is required. The notice shall allow at least seven (7) days for submittal of bids, proposals, replies, or responses.

(c) The District may maintain lists of persons interested in receiving notices of Invitations to Bid, Requests for Proposals, Invitations to Negotiate, or Competitive Solicitations. The District shall make a good faith effort to provide written notice, by electronic mail, United States Mail, hand delivery, or facsimile, to persons who provide their name and address to the District Manager for inclusion on the list. However, failure of a person to receive the notice shall not invalidate any contract awarded in accordance with this Rule and shall not be a basis for a protest of any contract award.

(d) If the District has pre-qualified suppliers of goods, supplies, and materials, then, at the option of the District, only those persons who have been pre-qualified will be eligible to submit bids, proposals, replies, or responses.

(e) In order to be eligible to submit a bid, proposal, reply, or response, a firm or individual must, at the time of receipt of the bids, proposals, replies, or responses:

(i) Hold all required applicable state professional licenses in good standing;

(ii) Hold all required applicable federal licenses in good standing, if any;

(iii) Hold a current and active Florida corporate charter or be authorized to do business in the State of Florida in accordance with Chapter 607 of the Florida Statutes, if the vendor is a corporation; and

(iv) Meet any special pre-qualification requirements set forth in the Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation.

Evidence of compliance with these Rules must be submitted with the bid, proposal, reply or response if required by the District. Failure to submit evidence of compliance when required may be grounds for rejection of the bid, proposal, reply, or response.

Any firm or individual whose principal place of business is outside the State of Florida must also submit a written opinion of an attorney at law licensed to practice law in that foreign state, as to the preferences, if any or none, granted by the law of that foreign state to business entities whose principal places of business are in that foreign state, in the letting of any or all public contracts. Failure to submit such a written opinion or submission of a false or misleading written opinion may be grounds for rejection of the bid, proposal, reply, or response.

(f) Bids, proposals, replies, and responses shall be publicly opened at the time and place noted on the Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation. Bids, proposals, replies, and responses shall be evaluated in accordance with the respective Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation, and this Rule. Minor variations in the bids, proposals, replies, or responses may be waived by the Board. A variation is minor if waiver of the variation does not create a competitive advantage or disadvantage of a material nature. Mistakes in arithmetic extension of pricing may be corrected by the Board. Bids and proposals may not be modified or supplemented after opening; provided however, additional information may be requested and/or provided to evidence compliance, make non-material modifications, clarifications, or supplementations, and as otherwise permitted by Florida law.

(g) The lowest Responsive Bid, after taking into account the preferences provided for in this subsection, submitted by a Responsive and Responsible Bidder in response to an Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation shall be accepted. If the lowest Responsive Bid is submitted by a Responsive and Responsible Bidder whose principal place of business is located in a foreign state which does not grant a preference in competitive purchase to businesses whose principal place of business are in that foreign state, the lowest Responsible and Responsive Bidder whose principal place of business is in the State of Florida shall be awarded a preference of five (5) percent. If the lowest Responsive Bid is submitted by a Responsive and Responsible Bidder whose principal place of business is located in a foreign state which grants a preference in competitive purchase to businesses whose principal place of business are in that foreign state, the lowest Responsible and Responsive Bidder whose principal place of

business is in the State of Florida shall be awarded a preference equal to the preference granted by such foreign state.

To assure full understanding of the responsiveness to the solicitation requirements contained in an Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation, discussions may be conducted with qualified vendors. Vendors shall be accorded fair treatment prior to the submittal date with respect to any opportunity for discussion, preparation, and revision of bids, proposals, replies, and responses.

(h) The Board shall have the right to reject all bids, proposals, replies, or responses because they exceed the amount of funds budgeted for the purchase, if there are not enough to be competitive, or if rejection is determined to be in the best interest of the District. No vendor shall be entitled to recover any costs of bid, proposal, reply, or response preparation or submittal from the District.

(i) The Board may require bidders and proposers to furnish bid bonds, performance bonds, and/or other bonds with a responsible surety to be approved by the Board.

(j) Notice of intent to award, including rejection of some or all bids, proposals, replies, or responses shall be provided in writing to all vendors by United States Mail, hand delivery, facsimile, or overnight delivery service. The notice shall include the following statement: "Failure to file a protest within the time prescribed in Rule 3.11 of the Rules of the District shall constitute a waiver of proceedings under those Rules," or wording to that effect. Protests of the District's purchase of goods, supplies, and materials under this Rule shall be in accordance with the procedures set forth in Rule 3.11.

(k) If less than three (3) Responsive Bids, Proposals, Replies, or Responses are received, the District may purchase goods, supplies, or materials, or may reject the bids, proposals, replies, or responses for a lack of competitiveness. If no Responsive Bid, Proposal, Reply, or Response is received, the District may proceed with the procurement of goods, supplies, and materials, in the manner the Board determines is in the best interests of the District, which may include but is not limited to a direct purchase of the goods, supplies, and materials without further competitive selection processes.

(3) <u>Goods, Supplies, and Materials included in a Construction Contract Awarded Pursuant to Rule 3.5 or 3.6.</u> There may be occasions where the District has undergone the competitive purchase of construction services which contract may include the provision of goods, supplies, or materials. In that instance, the District may approve a change order to the contract and directly purchase the goods, supplies, and materials. Such purchase of goods, supplies, and materials deducted from a competitively purchased construction contract shall be exempt from this Rule.

(4) Exemption. Goods, supplies, and materials that are only available from a single source are exempt from this Rule. Goods, supplies, and materials provided by governmental agencies are exempt from this Rule. A contract for goods, supplies, or materials is exempt from this Rule if state or federal law prescribes with whom the District must contract or if the rate of payment is established during the appropriation process. This Rule shall not apply to the purchase of goods, supplies or materials that are purchased under a federal, state, or local government contract that has been competitively procured by such federal, state, or local government in a manner consistent with the material procurement requirements of these Rules.

(5) Renewal. Contracts for the purchase of goods, supplies, and/or materials subject to this Rule may be renewed for a maximum period of five (5) years.

(6) Emergency Purchases. The District may make an Emergency Purchase without complying with these rules. The fact that an Emergency Purchase has occurred or is necessary shall be noted in the minutes of the next Board meeting.

Specific Authority: §§ 190.011(5), 190.011(15), Fla. Stat.
Law Implemented: §§ 189.053, 190.033, 287.017, 287.084, Fla. Stat.

Rule 3.9 Maintenance Services.

(1) Scope. All contracts for maintenance of any District facility or project shall be set under the terms of this Rule if the cost exceeds the amount provided in Section 287.017 of the Florida Statutes, for CATEGORY FOUR. A contract involving goods, supplies, and materials plus maintenance services may, in the discretion of the Board, be treated as a contract for maintenance services. However, a purchase shall not be divided solely in order to avoid the threshold bidding requirements.

(2) Procedure. When a purchase of maintenance services is within the scope of this Rule, the following procedures shall apply:

(a) The Board shall cause to be prepared an Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation.

(b) Notice of the Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation shall be advertised at least once in a newspaper of general circulation within the District and within the county in which the District is located. The notice shall also include the amount of the bid bond, if one is required. The notice shall allow at least seven (7) days for submittal of bids, proposals, replies, or responses.

(c) The District may maintain lists of persons interested in receiving notices of Invitations to Bid, Requests for Proposals, Invitations to Negotiate, and Competitive Solicitations. The District shall make a good faith effort to provide written notice, by electronic mail, United States Mail, hand delivery, or facsimile, to persons who provide their name and address to the District Manager for inclusion on the list. However, failure of a person to receive the notice shall not invalidate any contract awarded in accordance with this Rule and shall not be a basis for a protest of any contract award.

(d) If the District has pre-qualified suppliers of maintenance services, then, at the option of the District, only those persons who have been pre-qualified will be eligible to submit bids, proposals, replies, and responses.

(e) In order to be eligible to submit a bid, proposal, reply, or response, a firm or individual must, at the time of receipt of the bids, proposals, replies, or responses:

(i) Hold all required applicable state professional licenses in good standing;

(ii) Hold all required applicable federal licenses in good standing, if any;

(iii) Hold a current and active Florida corporate charter or be authorized to do business in the State of Florida in accordance with Chapter 607 of the Florida Statutes, if the vendor is a corporation; and

(iv) Meet any special pre-qualification requirements set forth in the Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation.

Evidence of compliance with these Rules must be submitted with the bid, proposal, reply, or response if required by the District. Failure to submit evidence of compliance when required may be grounds for rejection of the bid, proposal, reply, or response.

(f) Bids, proposals, replies, and responses shall be publicly opened at the time and place noted on the Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation. Bids, proposals, replies, and responses shall be evaluated in accordance with the respective Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation, and these Rules. Minor variations in the bids, proposals, replies, and responses may be waived by the Board. A variation is minor if waiver of the variation does not create a competitive advantage or disadvantage of a material nature. Mistakes in arithmetic extension of pricing may be corrected by the Board. Bids and proposals may not be modified or supplemented after opening; provided however, additional information may be requested and/or provided to evidence compliance, make non-material modifications, clarifications, or supplementations, and as otherwise permitted by Florida law.

(g) The lowest Responsive Bid submitted in response to an Invitation to Bid by a Responsive and Responsible Bidder shall be accepted. In relation to a Request for Proposals, Invitation to Negotiate or Competitive Solicitation the Board shall select the Responsive Proposal, Reply, or Response submitted by a Responsive and Responsible Vendor which is most advantageous to the District. To assure full understanding of the responsiveness to the solicitation requirements contained in a Request for Proposals, Invitation to Negotiate, or Competitive Solicitation, discussions may be conducted with qualified vendors. Vendors shall be accorded fair treatment prior to the submittal date with respect to any opportunity for discussion, preparation, and revision of bids, proposals, replies, or responses.

(h) The Board shall have the right to reject all bids, proposals, replies, or responses because they exceed the amount of funds budgeted for the purchase, if there are not enough to be competitive, or if rejection is determined to be in the best interest of the District. No Vendor shall be entitled to recover any costs of bid, proposal, reply, or response preparation or submittal from the District.

(i) The Board may require bidders and proposers to furnish bid bonds, performance bonds, and/or other bonds with a responsible surety to be approved by the Board.

(j) Notice of intent to award, including rejection of some or all bids, proposals, replies, or responses shall be provided in writing to all vendors by United

States Mail, hand delivery, facsimile, or overnight delivery service. The notice shall include the following statement: "Failure to file a protest within the time prescribed in Rule 3.11 of the Rules of the District shall constitute a waiver of proceedings under those Rules," or wording to that effect. Protests of the District's procurement of maintenance services under this Rule shall be in accordance with the procedures set forth in Rule 3.11.

(k) If less than three (3) Responsive Bids, Proposals, Replies, or Responses are received, the District may purchase the maintenance services or may reject the bids, proposals, replies, or responses for a lack of competitiveness. If no Responsive Bid, Proposal, Reply, or Response is received, the District may proceed with the procurement of maintenance services, in the manner the Board determines is in the best interests of the District, which may include but is not limited to a direct purchase of the maintenance services without further competitive selection processes.

(3) Exemptions. Maintenance services that are only available from a single source are exempt from this Rule. Maintenance services provided by governmental agencies are exempt from this Rule. A contract for maintenance services is exempt from this Rule if state or federal law prescribes with whom the District must contract or if the rate of payment is established during the appropriation process.

(4) Renewal. Contracts for the purchase of maintenance services subject to this Rule may be renewed for a maximum period of five (5) years.

(5) Contracts; Public Records. In accordance with Florida law, each contract entered into pursuant to this Rule shall include provisions required by law that require the contractor to comply with public records laws.

(6) Emergency Purchases. The District may make an Emergency Purchase without complying with these rules. The fact that an Emergency Purchase has occurred or is necessary shall be noted in the minutes of the next Board meeting.

Specific Authority: §§ 190.011(5), 190.011(15), 190.033, Fla. Stat.
Law Implemented: §§ 119.0701, 190.033, 287.017, Fla. Stat.

Rule 3.10 Contractual Services.

(1) Exemption from Competitive Purchase. Pursuant to Section 190.033(3) of the Florida Statutes, Contractual Services shall not be subject to competitive purchasing requirements. If an agreement is predominantly for Contractual Services, but also includes maintenance services or the purchase of goods and services, the contract shall not be subject to competitive purchasing requirements. Regardless of whether an advertisement or solicitation for Contractual Services is identified as an Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation, no rights or remedies under these Rules, including but not limited to protest rights, are conferred on persons, firms, or vendors proposing to provide Contractual Services to the District.

(2) Contracts; Public Records. In accordance with Florida law, each contract for Contractual Services shall include provisions required by law that require the contractor to comply with public records laws.

Specific Authority: §§ 190.011(5), 190.011(15), Fla. Stat.
Law Implemented: §§ 119.0701, 190.011(3), 190.033, Fla. Stat.

Rule 3.11 Protests with Respect to Proceedings under Rules 3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.8, and 3.9.

The resolution of any protests with respect to proceedings under Rules 3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.8, and 3.9 shall be in accordance with this Rule.

(1) Filing.

(a) With respect to a protest regarding qualifications, specifications, documentation, or other requirements contained in a Request for Qualifications, Request for Proposals, Invitation to Bid, or Competitive Solicitation issued by the District, the notice of protest shall be filed in writing within seventy-two (72) calendar hours (excluding Saturdays, Sundays, and state holidays) after the first advertisement of the Request for Qualifications, Request for Proposals, Invitation to Bid, or Competitive Solicitation. A formal protest setting forth with particularity the facts and law upon which the protest is based shall be filed within seven (7) calendar days (including Saturdays, Sundays, and state holidays) after the initial notice of protest was filed. For purposes of this Rule, wherever applicable, filing will be perfected and deemed to have occurred upon receipt by the District. Failure to file a notice of protest shall constitute a waiver of all rights to protest the District's intended decision. Failure to file a formal written protest shall constitute an abandonment of the protest proceedings and shall automatically terminate the protest proceedings.

(b) Except for those situations covered by subsection (1)(a) of this Rule, any firm or person who is affected adversely by a District's ranking or intended award under Rules 3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.8, or 3.9 and desires to contest the District's ranking or intended award, shall file with the District a written notice of protest within seventy-two (72) calendar hours (excluding Saturdays, Sundays, and state holidays) after receipt of the notice of the District's ranking or intended award. A formal protest setting forth with particularity the facts and law upon which the protest is based shall be filed within seven (7) calendar days (including Saturdays, Sundays, and state holidays) after the initial notice of protest was filed. For purposes of this Rule, wherever applicable, filing will be perfected and deemed to have occurred upon receipt by the District. Failure to file a notice of protest shall constitute a waiver of all rights to protest the District's ranking or intended award. Failure to file a formal written protest shall constitute an abandonment of the protest proceedings and shall automatically terminate the protest proceedings.

(c) If the requirement for the posting of a protest bond and the amount of the protest bond, which may be expressed by a percentage of the contract to be awarded or a set amount, is disclosed in the District's competitive solicitation documents for a particular purchase under Rules 3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.8, or 3.9, any person who files a notice of protest must post the protest bond. The amount of the protest bond shall be determined by District staff after consultation with the Board and within the limits, if any, imposed by

Florida law. In the event the protest is successful, the protest bond shall be refunded to the protestor. In the event the protest is unsuccessful, the protest bond shall be applied towards the District's costs, expenses, and attorney's fees associated with hearing and defending the protest. In the event the protest is settled by mutual agreement of the parties, the protest bond shall be distributed as agreed to by the District and protestor.

(d) The District does not accept documents filed by electronic mail or facsimile transmission. Filings are only accepted during normal business hours.

(2) Contract Execution. Upon receipt of a notice of protest which has been timely filed, the District shall not execute the contract under protest until the subject of the protest is resolved. However, if the District sets forth in writing particular facts and circumstances showing that delay incident to protest proceedings will jeopardize the funding for the project, will materially increase the cost of the project, or will create an immediate and serious danger to the public health, safety, or welfare, the contract may be executed.

(3) Informal Proceeding. If the Board determines a protest does not involve a disputed issue of material fact, the Board may, but is not obligated to, schedule an informal proceeding to consider the protest. Such informal proceeding shall be at a time and place determined by the Board. Notice of such proceeding shall be sent via facsimile, United States Mail, or hand delivery to the protestor and any substantially affected persons or parties not less than three (3) calendar days prior to such informal proceeding. Within thirty (30) calendar days following the informal proceeding, the Board shall issue a written decision setting forth the factual, legal, and policy grounds for its decision.

(4) Formal Proceeding. If the Board determines a protest involves disputed issues of material fact or if the Board elects not to use the informal proceeding process provided for in section (3) of this Rule, the District shall schedule a formal hearing to resolve the protest. The Chairperson shall designate any member of the Board (including the Chairperson), District Manager, District Counsel, or other person as a hearing officer to conduct the hearing. The hearing officer may:

(a) Administer oaths and affirmations;

(b) Rule upon offers of proof and receive relevant evidence;

(c) Regulate the course of the hearing, including any pre-hearing matters;

(d) Enter orders; and

(e) Make or receive offers of settlement, stipulation, and adjustment.

The hearing officer shall, within thirty (30) days after the hearing or receipt of the hearing transcript, whichever is later, file a recommended order which shall include a caption, time and place of hearing, appearances entered at the hearing, statement of

the issues, findings of fact and conclusions of law, separately stated, and a recommendation for final District action. The District shall allow each party fifteen (15) days in which to submit written exceptions to the recommended order. The District shall issue a final order within sixty (60) days after the filing of the recommended order.

(5) Intervenors. Other substantially affected persons may join the proceedings as intervenors on appropriate terms which shall not unduly delay the proceedings.

(6) Rejection of all Qualifications, Bids, Proposals, Replies and Responses after Receipt of Notice of Protest. If the Board determines there was a violation of law, defect, or an irregularity in the competitive solicitation process, the Bids, Proposals, Replies, and Responses are too high, or if the Board determines it is otherwise in the District's best interest, the Board may reject all qualifications, bids, proposals, replies, and responses and start the competitive solicitation process anew. If the Board decides to reject all qualifications, bids, proposals, replies, and responses and start the competitive solicitation process anew, any pending protests shall automatically terminate.

(7) Settlement. Nothing herein shall preclude the settlement of any protest under this Rule at any time.

Specific Authority: §§ 190.011(5), 190.011(15), Fla. Stat.
Law Implemented: § 190.033, Fla. Stat.

Rule 4.0 Effective Date.

These Rules shall be effective October 26, 2021, except that no election of officers required by these Rules shall be required until after the next regular election for the Board.

Specific Authority: §§ 190.011(5), 190.011(15), Fla. Stat.
Law Implemented: §§ 190.011(5), 190.011(15), Fla. Stat.

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

12A

PUBLISHER AFFIDAVIT
CLAY TODAY
Published Weekly
Orange Park, Florida

STATE OF FLORIDA
COUNTY OF CLAY:

Before the undersigned authority personally appeared Jon Cantrell, who on oath says that he is the publisher of the "Clay Today" a newspaper published weekly at Orange Park in Clay County, Florida; that the attached copy of advertisement being a

REQUEST FOR QUALIFICATIONS

in the matter of

ENGINEERING SERVICES

LEGAL: 48347 ORDER: 328494

was published in said newspaper in the issues:

09/02/2021

Affiant further says that said "Clay Today" is a newspaper published at Orange Park, in said Clay County, Florida, and that the said newspaper has heretofore been continuously published in said Clay County, Florida, weekly, and has been entered as Periodical material matter at the post office in Orange Park, in said Clay County, Florida, for period of one year next proceeding the first publication of the attached copy of advertisement; and affiant further says that he has neither paid nor promised any person, firm or corporation any discount, rebate, commission or refund for the purpose of securing this advertisement for publication in the said newspaper.

Sworn to me and subscribed before me 09/02/2021.

NOTARY PUBLIC, STATE OF FLORIDA

CHRISTIE LOU WAYNE
MY COMMISSION # HH34426
EXPIRES: September 20, 2024

REQUEST FOR QUALIFICATIONS ("RFQ") FOR ENGINEERING SERVICES FOR THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

RFQ for Engineering Services
Clay County, Florida

The Creekview Community Development District ("**District**"), located entirely within Clay County, Florida, announces that professional engineering services will be required on a continuing basis for the District's existing public infrastructure, including stormwater and drainage infrastructure, roadways, and all other public improvements authorized by Chapter 190, Florida Statutes. The engineering firm selected will act in the general capacity of District Engineer and provide District engineering services, as required, under a continuing contract.

Any firm or individual ("**Applicant**") desiring to provide professional services to the District must: 1) hold applicable federal, state and local licenses; 2) be authorized to do business in Florida in accordance with Florida law; and 3) furnish a statement ("**Qualification Statement**") of its qualifications and past experience on U.S. General Service Administration's "Architect-Engineer Qualifications, Standard Form No. 330," with pertinent supporting data. Among other things, Applicants must submit information relating to: a) the ability and adequacy of the Applicant's professional personnel; b) whether the Applicant is a certified minority business enterprise; c) the Applicant's willingness to meet time and budget requirements; d) the Applicant's past experience and performance, including but not limited to past experience providing professional services for any community development districts and past experience with Clay County; e) the geographic location of the Applicant's headquarters and offices; f) the current and projected workloads of the Applicant; and g) the volume of work previously awarded to the Applicant by the District, if any. Further, each Applicant must identify the specific individual affiliated with the Applicant who would be handling District Engineer services.

The District will review all Applicants and will comply with Florida law, including the Consultant's Competitive Negotiation Act, Chapter 287, Florida Statutes ("**CCNA**"). All Applicants must submit one (1) original hard copy and one (1) electronic copy on a flash drive of Standard Form No. 330 and Qualification Statement by **12:00 p.m. on September 20, 2021**, to the attention of Craig Wrathell, c/o Wrathell, Hunt and Associates, LLC, located at 52300 Glades Rd #410W, Boca Raton, FL 33431 ("**District Manager's Office**").

The Board shall select and rank the Applicants using the requirements set forth in the CCNA and the evaluation criteria on file with the District Manager, and the highest ranked Applicant will be requested to enter into contract negotiations. If an agreement cannot be reached between the District and the highest ranked Applicant, negotiations will cease and begin with the next highest ranked Applicant, and if these negotiations are unsuccessful, will continue to the third highest ranked Applicant and so on.

The District reserves the right to reject any and all Qualification Statements and to retain multiple engineering firms to perform work as needed. Additionally, there is no express or implied obligation for the District to reimburse Applicants for any expenses associated with the preparation and submittal of the Qualification Statements in response to this request.

Any protest regarding the terms of this Notice, or the evaluation criteria on file with the District Manager's Office, must be filed in writing with the District Manager's Office, within seventy-two (72) hours (excluding weekends) after the publication of this Notice. The formal protest setting forth with particularity the facts and law upon which the protest is based shall be filed within seven (7) calendar days after the initial notice of protest was filed. Failure to timely file a notice of protest or failure to timely file a formal written protest shall constitute a waiver of any right to object or protest with respect to aforesaid Notice or evaluation criteria provisions. Any person who files a notice of protest shall provide to the District, simultaneous with the filing of the notice, a protest bond with a responsible surety to be approved by the District and in the amount of Ten Thousand Dollars ($10,000.00). Additional information and requirements regarding protests are set forth in the District's Rules of Procedure, which are available from the District Manager's Office.

Any and all questions relative to this RFQ shall be directed in writing by e-mail only to Craig A. Wrathell at wrathellc@whhassociates.com with an e-mail copy to Jennifer Kilinski at Jennifer@kelawgroup.com.

District Manager

Legal 48347 published Sept 2, 2021 in Clay County's Clay Today newspaper

3515 US HWY 17 Suite A, Fleming Island FL 32003
Telephone (904) 264-3200 - FAX (904) 264-3285
E-Mail: Christie@opcfla.com

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

12B

REQUEST FOR QUALIFICATIONS FOR ENGINEERING SERVICES
FOR THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

RFQ for Engineering Services

The Creekview Community Development District ("**District**"), located in Clay County, Florida, announces that professional engineering services will be required on a continuing basis for the District's stormwater systems, and other public improvements authorized by Chapter 190, *Florida Statutes*. The engineering firm selected will act in the general capacity of District Engineer and will provide District engineering services, as required.

Any firm or individual ("**Applicant**") desiring to provide professional services to the District must: 1) hold applicable federal, state and local licenses; 2) be authorized to do business in Florida in accordance with Florida law; and 3) furnish a statement ("**Qualification Statement**") of its qualifications and past experience on U.S. General Service Administration's "Architect-Engineer Qualifications, Standard Form No. 330," with pertinent supporting data. Among other things, Applicants must submit information relating to: a) the ability and adequacy of the Applicant's professional personnel; b) whether the Applicant is a certified minority business enterprise; c) the Applicant's willingness to meet time and budget requirements; d) the Applicant's past experience and performance, including but not limited to past experience as a District Engineer for any community development districts and past experience with the City of Leesburg and Lake County) the geographic location of the Applicant's headquarters and offices; f) the current and projected workloads of the Applicant; and g) the volume of work previously awarded to the Applicant by the District. Further, each Applicant must identify the specific individual affiliated with the Applicant who would be handling District meetings, construction services, and other engineering tasks.

The District will review all Applicants and will comply with Florida law, including the Consultant's Competitive Negotiations Act, Chapter 287, *Florida Statutes* ("**CCNA**"). All Applicants interested must submit electronic copies of Standard Form No. 330 and the Qualification Statement by **12:00 p.m., on September 20, 2021,** to the attention of Wrathell, Hunt & Associates, LLC (by email to: gillyardd@whhassociates.com) ("**District Manager's Office**").

The Board shall select and rank the Applicants using the requirements set forth in the CCNA and the evaluation criteria on file with the District Manager, and the highest ranked Applicant will be requested to enter into contract negotiations. If an agreement cannot be reached between the District and the highest ranked Applicant, negotiations will cease and begin with the next highest ranked Applicant, and if these negotiations are unsuccessful, will continue to the third highest ranked Applicant.

The District reserves the right to reject any and all Qualification Statements. Additionally, there is no express or implied obligation for the District to reimburse Applicants for any expenses associated with the preparation and submittal of the Qualification Statements in response to this request.

Any protest regarding the terms of this Notice, or the evaluation criteria on file with the District Manager, must be filed in writing, within seventy-two (72) hours (excluding weekends) after the publication of this Notice. The formal protest setting forth with particularity the facts and law upon which the protest is based shall be filed within seven (7) calendar days after the initial notice of protest was filed. Failure to timely file a notice of protest or failure to timely file a formal written protest shall constitute a waiver of any right to object or protest with respect to aforesaid Notice or evaluation criteria provisions. Any person who files a notice of protest shall provide to the District, simultaneous with the filing of the notice, a protest bond with a responsible surety to be approved by the District and in the amount of Twenty Thousand Dollars ($20,000.00).

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

DISTRICT ENGINEER PROPOSALS

COMPETITIVE SELECTION CRITERIA

1) **Ability and Adequacy of Professional Personnel** (Weight: 25 Points)

   Consider the capabilities and experience of key personnel within the firm including certification, training, and education; affiliations and memberships with professional organizations; etc.

2) **Consultant's Past Performance** (Weight: 25 Points)

   Past performance for other Community Development Districts in other contracts; amount of experience on similar projects; character, integrity, reputation, of respondent; etc.

3) **Geographic Location** (Weight: 20 Points)

   Consider the geographic location of the firm's headquarters, offices and personnel in relation to the project.

4) **Willingness to Meet Time and Budget Requirements** (Weight: 15 Points)

   Consider the consultant's ability and desire to meet time and budget requirements including rates, staffing levels and past performance on previous projects; etc.

5) **Certified Minority Business Enterprise** (Weight: 5 Points)

   Consider whether the firm is a Certified Minority Business Enterprise. Award either all eligible points or none.

6) **Recent, Current and Projected Workloads** (Weight: 5 Points)

   Consider the recent, current and projected workloads of the firm.

7) **Volume of Work Previously Awarded to Consultant by District** (Weight: 5 Points)

   Consider the desire to diversify the firms that receive work from the District; etc.

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

12CI

Request for Qualifications for Engineering Services for the Creekview Community Development District
September 20, 2021

ETM
England-Thims & Miller, Inc.
VISION • EXPERIENCE • RESULTS

ETM
VISION ▪ EXPERIENCE ▪ RESULTS

www.etminc.com
tel 904-642-8990 • fax 904-646-9485
14775 Old St. Augustine Road • Jacksonville, Florida 32258

September 20, 2021

Craig Wrathell
Wrathell, Hunt & Associates, LLC
2300 Glades Road, Suite 410W
Boca Raton, Florida 33431

Reference: Statement of Qualifications for Engineering Services for the Creekview Community Development District

Dear Mr. Wrathell,

The Creekview Community Development District (CDD) is creating a long lasting community experience for many families for years to come. To continue this, it is profoundly important that the Creekview CDD engage a District Engineer that understands your vision and possesses the experience to deliver effective site development strategies that will create the desired sense of place with solutions that meet the budget and time constraints.

Throughout the last 44 years, **England-Thims & Miller, Inc. (ETM)** has helped to create spaces where communities flourish and has emerged as a trusted District Engineer in the Northeast Florida market. Clients select ETM as their partner due to our exceptional quality service and experience providing engineering services for the most successful communities in Northeast Florida.

Our involvement in Northeast Florida's expanding residential silhouette is deeply personal, as we are a locally-based consulting firm that employs a large team of development managers, engineers, landscape architects, planners, and construction field representatives. We love serving our clients and creating community by bringing together an internal team of numerous professionals, each experts of their specific craft. This team is able to provide the following:

Experienced Personnel: ETM maintains a staff of 255 professionals, including 60 Land Development Specialists, who have extensive experience managing over 40 CDDs throughout Northeast Florida. We have developed deep-seated relationships while working closely with local and state agencies, and public-sector management.

ETM understands the District's focus on schedule and budget, and we know that the most efficient way to complete a project is to develop a well thought-out, high-level strategic approach.

Accessibility: Due to the size of the Creekview CDD and the multitude of simultaneous projects within the District, having a readily accessible District Engineer is imperative. With our headquarters located approximately half an hour away, the District can count on an immediate response to any onsite needs.

Extensive Experience with Community Development Districts: Our team has extensive experience designing and managing CDDs throughout Northeast Florida. Because of this experience, as District Engineer, our team will apply lessons learned, effective project management, and creative solutions to minimize costs and accelerate schedules.

Effective Development Strategies that Create the Desired Sense of Place: The creation of a sense of place requires attention to detail and an eye for design. Our project team members understand the relationship between human scale and sense of place, and have the knowledge to create each. We engage with our in-house planning, landscape architecture, CEI, and transportation departments to achieve the desired vision and goal of the District. Because of our partnerships with multiple CDDs, we grasp the importance of community features and fully understand the importance of adjusting plans appropriately and in a timely manner when faced with unforeseen circumstances. Our team is trained on how to handle these situations and will ensure that our design enhances the overall feel of this community.

We appreciate the opportunity to offer our time, talent, and expertise to serve the community and help you obtain your goals. Our depth of resources coupled with our experience uniquely qualifies ETM to serve as your District Engineer.

Sincerely,
ENGLAND-THIMS & MILLER, INC.

Scott Wild, PE, PSM, CFM
Executive Vice President

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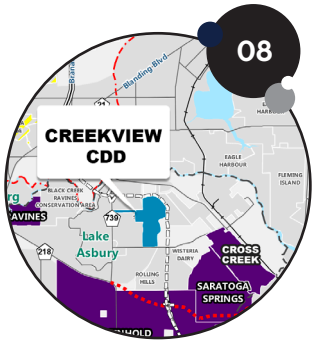

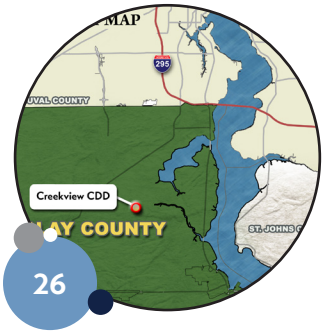

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2020	21.39%	A+

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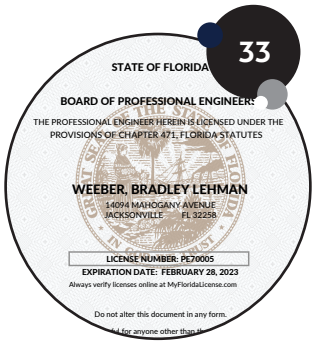

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1. Ability and Adequacy of Professional Personnel

1 ABILITY AND ADEQUACY OF PROFESSIONAL PERSONNEL

Because ETM has served as the District Engineer for over 40 Community Development Districts, we have acquired a surplus of CDD knowledge, experience, and an unrivaled familiarity with local governing agencies.

OUR COMMUNITY DEVELOPMENT DISTRICT EXPERIENCE

Community Development Districts (CDDs) are unique. The potential is greater, the focus is larger, and the associated risks are much higher. But when we successfully design a community together, the professional and emotional satisfaction is incomparable.

Our engineers have a solid reputation in the industry that is underscored by our extensive experience as District Engineer for multiple Master Planned Communities (MPCs) throughout Northeast Florida. Additionally, 44 years in business has resulted in valued relationships with local governments, utility and regulatory agencies, and trusted teaming partners. These relationships will enable us to provide the Creekview CDD with exceptional service and dedication.

OUR HISTORY AND CURRENT PROFILE

ETM has progressed from a two-person, land development engineering company to an award-winning, full-service consulting firm. Founded in 1977, our primary focus was to support private sector growth in Northeast Florida. As we grew, so did our client base and reputation. As a result, we became known for providing innovative quality engineering services for land development efforts.

Because of our success, the leadership of ETM felt encouraged to expand the company's service lines to meet the needs of both public and private sector clients. Today, these additional services position us as a one-stop shop and encompass the entire lifespan of a project, beginning with strategy, development, and planning, and culminating with inspection and closeout.

- Planning/Entitlements
- Land Development
- Utility Master Planning and Design
- Landscape Architecture
- Program Management
- Water Resources and Environmental Permitting
- Transportation and Traffic Engineering
- Construction Engineering and Inspection (CEI)
- Geographic Information Systems (GIS)
- Surveying and Mapping

Today, ETM employs 255 professionals spanning offices in Jacksonville, Palm Coast, Daytona Beach, Gainseville, and Lake Mary. Now, with engineering capabilities ranging from master planning and alternatives evaluation through final design and construction administration, we offer the expertise required to deliver any project anticipated by the Creekview CDD.

PROFESSIONAL SNAPSHOT

Successfully delivering results will require a diversified group of experienced engineering professionals with an excellent track record and the expertise necessary to meet the goals for the Creekview CDD. ETM currently employs the following professionals, all available to help meet the needs of the Creekview CDD:

- 41 Civil Engineers
- 22 Project Managers
- 4 Planners
- 9 GIS Specialists
- 18 CAD Technicians/Design
- 1 Technician/Analyst
- 43 Construction Inspectors/Managers
- 7 Landscape Architects
- 66 Survey Personnel
- 44 Administrative Personnel

EXECUTIVE MANAGEMENT

The day-to-day management and ownership of the firm has been successfully transitioned from the founders to the next generation, and is composed of a hands-on executive team of 25 shareholders. We practice a debt-free approach to business that provides our clients with the assurance of our financial stability to continue steady growth and expansion of services. To ensure our focus on quality, we adhere to a stringent Executive Vice President led Quality Assurance/Quality Control process as part of our everyday practice.

QUALIFIED PROJECT TEAM

To address the projects anticipated as part of the Creekview CDD, we have assembled a very experienced core project team that will be supported by additional ETM staff, as needed. The technical excellence you will receive is a direct result of the experience of our professionals who possess the commitment and resolution necessary to foster innovation and drive performance. Our team has the ability to anticipate project challenges and leverage lessons learned to develop cost-effective and schedule-sensitive solutions.

The ETM team has collectively served the needs of over 40 CDDs in Northeast Florida. We have experience coordinating with many public agencies, including Clay County, Clay County Utility Authority, Clay Electric, the US Army Corps of Engineers, the Florida Department of Environmental Protection, the Florida Department of Transportation, and the St. Johns River Water Management District.

We proudly present our key team contributors on the following pages. Each has established themselves as deeply respected, well-seasoned professionals within their area of expertise.

PROJECT TEAM

Scott Wild, PE, CFM, PSM
Client Relations & Project Strategy

Scott has 32 years of engineering experience related to MPCs and has worked closely with several CDDs in Northeast Florida. He is known for his ability to quickly identify potential issues and select the cost-effective, permittable solutions that ensure engineering plans, reports, and specifications meet the highest standards. As Project Strategy Officer, he will draw from his environmental background and his tremendous volume of large project and MPC experience, proving to be an invaluable resource to the District.

Bradley Weeber, PE, LEED AP
Project Manager

Brad has 15 years of experience providing services to public and private clients. He has been involved with many projects throughout Northeast Florida, including Silverleaf, Brooklyn Apartments, Shops of Sawgrass, The Strand and Crossing at Town Center, Trail Ridge Landfill, and the neighborhoods of Nocatee. Brad is a licensed professional engineer in Florida and Georgia, and is also an accredited LEED AP. Additionally, Brad is a member of Northeast Florida Builders Association, where he is active on the Government Affairs Committee.

Ann Newland, PE
Senior Project Engineer

Ann has over 25 years of varied experience in environmental and land development projects including environmental remediation, design of stormwater management systems, water distribution systems, wastewater collection and disposal systems, roadway design, and commercial and residential developments. Her experience includes planning, design, and project management of residential and commercial developments throughout North Florida and Georgia.

Daniel Welch, PE
Project Engineer

Daniel has over six years of experience in consulting, management, engineering, and design of residential, commercial, and roadway infrastructure projects. His primary emphasis and experience is in Land Development with a focus on providing project management, overseeing the design and permitting of various projects throughout Northeast Florida.

PROJECT TEAM

Jason Hall, PE
Transportation Engineer

Jason has 21 years of highway design and construction experience on federal, state, and local roadway systems. His responsibilities include project management, roadway design, utility design, cost estimation, temporary traffic control, permitting, and specifications development. With numerous years of experience working directly with multiple City and State agencies on projects such as E-Town Parkway, Alta Drive, and Southeast Quadrant, he brings his knowledge of City and State requirements and preferences to this project, as well as a continuity and stability in leadership.

Karl Soderholm, PLA, AICP, LEED AP
Landscape Architect

Karl has 22 years of landscape architecture experience and has overseen many large-scale landscape and planning projects. He possesses the ability to see a cohesive vision of the aesthetics within an MPC and will provide the District the community look and feel they desire. He specializes in site and transit planning, landscape and hardscape design, pedestrian and community movement, and project sustainability. He will provide any planning and landscape architecture services for the District on this contract.

Buckley Williams, CCCA
Construction Administration

Buckley has 29 years of experience which includes managing quality inspection personnel who serve as client advocates in the field. Buckley is committed to providing not only responsive services to the District, but also the requisite technical inspections and proactive contract administration services needed to meet project objectives. Under this contract, he will lend insight to the project team, and ensure that the highest level of quality CEI services are provided to the Creekview CDD.

Jeff Brooks
Construction Administration

Jeff has 37 years of experience in tasks relating to construction projects from concept to completion. He has extensive experience in Clay County and also has a strong background in water and wastewater operations and construction inspection. His responsibilities include the administration and inspection of infrastructure construction projects, on-site payment request review, testing observation, and project documentation.

2. Consultant's Past Performance

2 CONSULTANT'S PAST PERFORMANCE

ETM has been honored and rewarded with the opportunity to be involved in the development of the region's most notable communities. We are recognized for the creative solutions that emerged from our holistic approach during the development of these communities. The depth of our experiences and our relationships with local regulatory agencies are invaluable assets to our clients.

The table below is a sampling of ETM's vast experience with Special Districts.

Project	County	Size	Dwelling Units	Non-Residential S.B.
Julington Creek Plantation	St. Johns	5,000 Acres	5,800 Residential	750,000 SF Non-Residential
Aberdeen	St. Johns	1,300 Acres	1,623 Single Family 395 Multi-Family	40,000 SF Office 60,000 SF Commercial 10,000 SF Community Park
Six Mile Creek (TrailMark)	St. Johns	1,282 Acres	2,278 Residential	7 Acre Amenity Village 30 Acre Community Park 17 Acre Neighborhood Park
Southhaven	St. Johns	314 Acres	345 Residential	$2.2 Million Amenity/Recreation
Heritage Landing	St. Johns	597 Acres	1,154 Residential	27 Acre Park/Recreation $6.1 Million Amenity
Durbin Crossing	St. Johns	2,047 Acres	2,500 Residential	170,000 SF Office/Retail
Tolomato (Nocatee)	St. Johns & Duval	15,000 Acres	11,000 Single Family 4,000 Multi-Family	4 Million SF Office 1 Million SF Commercial/Retail 250,000 SF Industrial
Bartram Park	St. Johns & Duval	3,600 Acres	2,000 Single Family 7,000 Multi-Family 330 Hotel Rooms	1.3 Million SF Commercial 1.6 Million SF Office
Beach (Tamaya)	Duval	780 Acres	2,400 Residential	500,000 SF Commercial/Retail 10,000 SF Clubhouse
Bartram Springs	Duval	1,000 Acres	1,400 Residential	19 Acre School Site 7 Acre City Park
Argyle Forest	Clay & Duval	10,000 Acres	25,000 Residential	5 Million SF Non-Residential
Oakleaf	Clay & Duval	6,000 Acres	5,000 Residential	1 Million SF Commercial/Retail 2 Amenity Centers 82 Acre Park, Golf Course Community
East Nassau Stewardship District	Nassau	24,000 Acres	24,000 Residential	11.5 Million SF Non-Residential

ETM Master Planned Communities & Large Scale Development Experience

Legend

- LARGE SCALE DEVELOPMENT
- MASTER PLANNED COMMUNITY
- CDD EXPERIENCE

1in = 4 miles

N

0 2 4 8
Miles

EAST NASSAU CPA
EAST NASSAU CPA
EAST NASSAU CPA
EAST NASSAU STEWARDSHIP DISTRICT
CHESTER RD. DSAP #2
THREE RIVERS
LOFTON POINT
NORTH HAMPTON
FLORA PARKE
AMELIA WALK
CRANE ISLAND
AMELIA ISLAND PLANTATION
WALTON
YELLOW BLUFF LANDING
TREDNICK & ABBESS TRUST
THOMAS CREEK RAC
SHANDS HOSPITAL
RIVER CITY MARKETPLACE
PARKERS PLACE
TOYOTA CENTER
WESTSIDE INDUSTRIAL PARK
PERIMETER WEST INDUSTRIAL PARK
WESTLAKE INDUSTRIAL PARK
BLOUNT ISLAND MARINE TERMINAL
QUEENS HARBOUR YACHT CLUB
OCEAN WALK & SELVA MARINA
KENSINGTON
TAMAYA
PABLO BAY
CECIL COMMERCE CENTER
DEERWOOD PARK
TOWNCENTER/ GATE PKWY
SKINNER
PABLO CREEK RESERVE
FREEDOM COMMERCE CENTRE
EAST HAMPTON
VILLAGES OF ARGYLE
OAKLEAF PLANTATION
OAKLEAF PLANTATION
AVENUES WALK
CYPRESS BLUFF CDD
DDI
BARTRAM PARK
FLAGLER CENTER
WELLS CREEK
NOCATEE
NOCATEE
NOCATEE
MARSH HARBOR
CELESTINA
BARTRAM SPRINGS
JULINGTON CREEK
DURBIN CREEK NATIONAL
DURBIN CROSSING
ABERDEEN
TWIN CREEKS
CREEKVIEW CDD
RAVINES
ANDERSON GREENBRIAR
ANDERSON COLUMBIA
JOHNS CREEK
SOUTH HAMPTON
RIVERTOWN
SILVERLEAF
LAS CALINAS
PALENCIA NORTH
KENSINGTON
PALENCIA
CROSS CREEK
SARATOGA SPRINGS
MAGNOLIA POINT
GRAND OAKS
RINGHAVER RANCH
BIG ISLAND CDD
SAINT JOHNS
BANNON LAKES
CORDOVA PALMS
TROUT CREEK VENTURE
MARKLAND
REINHOLD
REINHOLD
REINHOLD
GOVERNORS PARK
HERITAGE LANDING
SAINT JOHNS
MURABELLA
SAINT JOHNS
TRAILMARK
ROBINSON IMPROVEMENT COMPANY

Fernandina Beach
Atlantic Beach
Neptune Beach
Jacksonville Bea
Ponte Vedra B
Callahan
Yulee
Baldwin
Jacksonville
Arlington
Springfield
Riverside
Avondale
San Marco
Ortega
San Jose
Mandarin
Orange Park
Mandarin
Fruit Cove
Switzerland
Middleburg
Lake Asbury
Penney Farms
Green Cove Springs
St. Augustine
ST. JOHNS RIVER
DUVAL COUNTY
CLAY COUNTY
ST JOHNS COUNTY

ETM
England-Thims & Miller, Inc.
VISION • EXPERIENCE • RESULTS

A sampling of our Community Development and Special District experience also includes:

- Boggy Branch
- Celebration Pointe
- Cypress Bluff
- Deer Run
- Durbin Crossing
- East Nassau Stewardship
- Heritage Landing
- Isles of Bartram
- Julington Creek Plantation
- Kindlewood
- Las Calinas
- Mainstreet
- Marshall Creek
- Meadow View at Twin Creeks
- Middle Village
- Oakleaf
- OTC
- Palm Coast
- Pine Ridge
- Pioneer
- Rivers Edge
- Ryals Creek
- Six Mile Creek
- South Village
- Split Pine
- Sweetwater Creek
- The Dunes
- Timucuan South
- Tison's Landing
- Tolomato
- Treaty Oaks
- Turnbull Creek
- Wynnfield Lakes

RELATIONSHIP MANAGEMENT

All of our Master Planned Communities (MPC) have one thing in common: the entire team must earn the trust and maintain great relationships with agency regulators. For that reason, municipality experience is essential. **ETM brings established relationships and experience to the team.**

PROJECT CASE STUDIES

ETM has assisted with the design, engineering, and construction of a multitude of projects. The following pages best showcase our experience.

▼ **Julington Creek**

▲ **Aberdeen**

▼ **Bartram Springs**

East Nassau Stewardship District

Location: Nassau County, Florida
Client: East Nassau Stewardship District
Contact: Mike Hahaj
Phone: (904) 321-1030
Completion: Ongoing

Project Tasks:

- District Engineer
- Site Engineering
- Environmental Permitting
- Landscape/Hardscape Architecture
- Master Planning

ETM is the District Engineer for the East Nassau Stewardship District, which is a 24,000-acre DRI project, that includes 640 acres of commercial development. At total build-out, this project will include 11-million-square-feet of non-residential space, 550,000-square-feet of commercial space, and 24,000 residential units. ETM is responsible for providing engineering reports, cost estimates, and plan reviews to ensure the proper construction of improvements within the District.

Tolomato CDD (Nocatee)

Location: Jacksonville, Florida
Client: The PARC Group, Inc.
Contact: Rick Ray
Phone: (904) 992-9750
Project Costs: $200 Million
Completion: Ongoing

Project Tasks:

- District Engineer
- Master Planning
- Project Management
- Engineering Design
- Environmental Permitting
- Transportation Engineering
- Surveying
- Construction Administration
- Landscape Architecture

"ETM has designed and managed more than $200 Million in roadway and utility construction for The PARC Group...We have found ETM's capability to handle the dynamic requirements in a project with both environmental and public interest to be professional and effective."
~ Gregory J. Barbour
The PARC Group, Inc.

Nocatee is one of the top 10 best selling communities in the nation. This 15,000-acre parcel at total build-out will consist of 11,000 residential units, 5-million-square-feet of non-residential space and recreation/open spaces, churches, schools and civic uses. ETM has been involved with this project since 1997 when the PARC Group began the conceptual planning process and we are proud of our involvement in the engineering design, planning and landscape architecture of this project.

In addition to providing the lead design consulting services, ETM was responsible for the design, permitting, and construction management of over 4 miles of Greenway Trails within Nocatee. The trails provide connections between communities, parks, and commercial districts. As part of an overall circulation plan within Nocatee, the trails and shared-use paths are 16′ wide in order to accommodate pedestrians, bicycles, golf carts, and low-speed vehicles.

Kindlewood CDD

Location: Jacksonville, Florida
Client: The Hutson Companies, LLC
Contact: David Hutson
Phone: (904) 262-7718
Project Costs: $100 Million
Completion: Ongoing

Project Tasks:

- District Engineer
- Site Engineering
- Environmental Permitting
- Landscape/Hardscape Architecture
- Master Planning

ETM was responsible for the master planning of this 10,000-acre DRI project which included roadway design, utility design, and master stormwater management design and permitting. In 1999, ETM served as Lead Consultant in a major modification to the Argyle Forest DRI.

The land development work included engineering and landscape design of over 5,000 residential units, two amenity centers (each over $7 Million), a regional baseball park, a regional soccer park, and over 1-million-square-feet of retail and commercial space. ETM was responsible for the day-to-day coordination efforts of six residential and connector highway construction projects in addition to amenity site construction. This project includes over 10 miles of connector roadway and infrastructure improvements, JEA and Clay County Utility Authority improvements, amenity center construction, box culvert construction, landscape and irrigation improvements, and lot development services.

Bartram Springs CDD

Location: Jacksonville, Florida
Client: SouthStar Development Partners, Inc.
Contact: Kimball Woodbury
Phone: (305) 476-1514
Completion: Ongoing

Project Tasks:

- District Engineer
- Master Planning and Engineering
- Stormwater Management
- Environmental Permitting
- Surveying and Mapping
- Construction Administration

Bartram Springs is a 1,400-lot single-family development in Southeast Duval County located on the northside of Race Track Road (immediately west of Philips Highway). The site is over 1,000 acres, half of which are wetlands that discharge to a Durbin Creek tributary. Additional features and elements include a multi-family parcel, a retail component, a city park site, an elementary school, and an amenity area.

Bartram Park CDD

Location: Jacksonville, Florida
Client: Eastland Partners
Contact: Tom Dodson
Phone: (904) 280-7100
Completion: Ongoing

Project Tasks:

- District Engineer
- Master Planning and Engineering
- Sewer Collection
- Reuse Water Distribution
- Stormwater Management
- Roadway Construction
- Surveying and Mapping
- Construction Engineering

Bartram Park is a 3,600-acre, mixed-use DRI. The project is located in South Duval County and North St. Johns County along I-95. The development consists of 2,000± single-family units, 7,000± multi-family units, 1.3-million-square-feet of commercial space, 1.6-million-square-feet of office space, and 330± hotel rooms. As part of the DRI, over 2,000± acres of preservation land was provided along Julington and Durbin Creek.

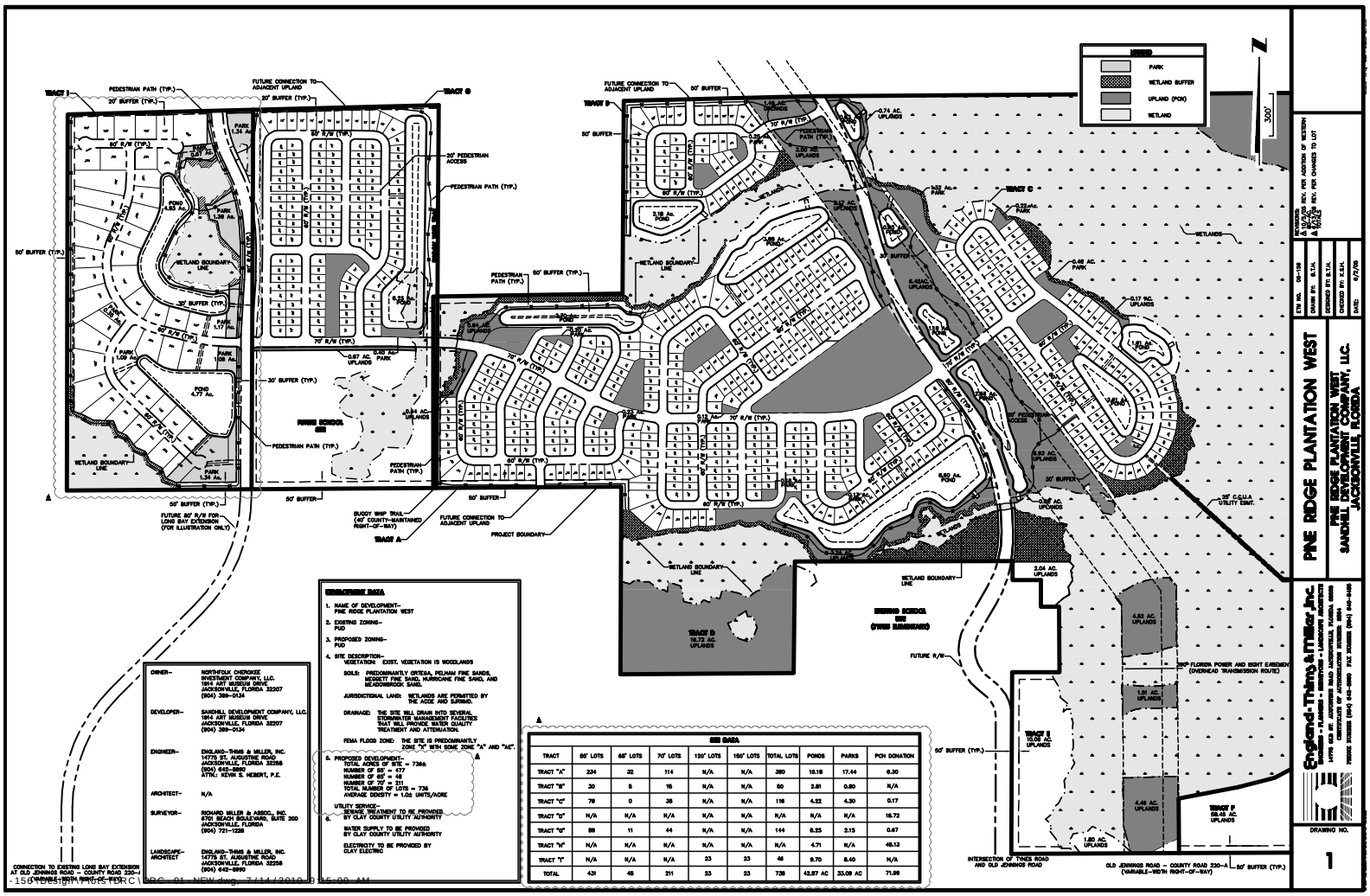
Pine Ridge Plantation

Location: Clay County, Florida
Client: Tynes Partners, LLC
Contact: Levi Ritter
Phone: (904) 399-0134

Project Tasks:

- Master Planning and Engineering
- Water and Sewer Design
- Stormwater Collection System Design
- Roadway Design
- Permitting
- Construction Administration

Since 2003, ETM has provided professional engineering services for this 735 single-family lot MPC located in Clay County. ETM's efforts for this project have included master site plan, water and sewer design, stormwater collection system design, roadway design, regulatory permitting, and construction administration.



Beach CDD (Tamaya)

Location: Duval County, Florida
Client: Beach CDD
Contact: Jill Cupps
Phone: (407) 382-3256

Project Tasks:

- District Engineer
- Master Planning and Engineering
- Stormwater Management
- Roadway Design
- Permitting
- Utility Coordination
- Requisition Processing
- Construction Administration

ETM was contracted by Beach CDD in Duval County to provide professional engineering support services. ETM's efforts for this project included coordination with utility providers and contractors, permitting, engineering services, project management, coordination with surveyors, architects, and other consultants, as well as requisition processing.

REPEAT BUSINESS

ETM's ability to achieve project goals and produce a high quality product allows us to develop lasting relationships with our clients. In every project, large or small, complex or straightforward, our attention to detail translates to excellence. ETM's standing in the industry is reflective of our caliber in many different ways: through innovation, by developing cost-effective solutions to difficult problems, and by efficiently coordinating the many interrelated elements critical to every project.

ETM is proud of the fact that 95% of our clients provide us with recurring business. Following is a partial list of our repeat business.

Clay County

- CR 315C Shoulder Improvements
- Clay County Continuing CEI Services
- Indigo Avenue - CEI
- CR 220 Safety Study
- CR 209 Intersection Study
- Odom Ranch - CEI
- Indigo Avenue - CEI

St. Johns County

- Armstrong Road Sidewalk Improvements
- Bishop Estates Road Crosswalk
- Continuing Engineering Services
- Continuing Traffic Engineering Services
- CR 210 Preliminary Roadway Engineering
- CR 210 West Traffic Signal Retiming
- Greenbrier Road/Roberts Road Traffic Signalization
- Kenton Morrison Road Intersection
- Mickler Road Preliminary Roadway Engineering
- Palmer Street/Evergreen Street Intersection Improvements
- Palm Valley Sidewalk Improvements
- PGA Tour/Marsh Landing/Solana Traffic Signalization
- Pope Road/CR A1A Traffic Signalization
- Pope Road/Mizell Road Sidewalk
- Race Track Road Median Closure Analysis
- Race Track Road Widening & Post Design
- Solana Road Crosswalk
- Traffic Counts/Delay Study
- US 1 Traffic Signal Warrant Analysis
- West Augustine In-Fill Housing/Preliminary Engineering Study

Coastal Ridge

- Cross Town Drive
- Crosswater Parkway Extension and CEI
- Crosswater Parkway Shared-Use Path
- Town Center Central Roadways - Landscape Architecture
- Nocatee Cart Path Improvements Plan
- Nocatee Greenway Trails
- Nocatee I-95 Signage
- Nocatee Parkway/Coastal Ridge Interchange
- Nocatee Parkway Design and CEI
- Nocatee Roundabout Restriping
- Nocatee Surveying
- Nocatee Town Center Roads
- Nocatee Village Drive
- Preservation Trail Extension - CEI
- Tolomato CDD
- Split Pine CDD Engineer
- Tolomato CDD General Consulting Engineering
- Town Center Park Site - CEI
- US 1/Durbin Creek Bridge - CEI
- Valley Ridge Boulevard Extension and CEI

Kindlewood CDD

- Double Branch Boulevard - 2 Lane
- Double Branch CDD General Consulting
- Double Branch Fitness Center
- Oakleaf - East Main Entrance
- Oakleaf - Old Middleburg Road - 4 Lane
- Oakleaf - Stonebrier
- Old Middleburg Road - 2 Lane
- The Village Center Improvements
- Waverly Neighborhood Park Engineering

City of Jacksonville

- Bay Street Bridge Expansion at Hogans Creek
- Brooklyn Phase 1B Construction
- Closure of Trail Ridge Landfill
- Lonnie Miller Park Development
- Lonnie Miller Park Master Plan
- Lower Eastside Drainage Improvements
- NPDES Contract
- Preservation Project
- Drainage Bond Program
- Project New Ground - Ash Remediation
- Sal Taylor Park - Closeout
- Septic Tank Phase Out
- Stormwater Utility

ICI Homes

- 301 Villages
- Ashford Mills Site Investigation
- Beach Boulevard Turn Lane & Median
- Palencia North Amenity Center & Park
- Palencia North Site Plan & Phase II
- Skinner ICI CDD Engineering Report
- Tamaya
- Vilano Beach Properties
- Wilford/Breakaway Trails
- Williams Tract Due Diligence

Hines

- Glen St. Johns
- Las Calinas
- Marsh Front
- Marshall Creek CDD
- Murabella - Due Diligence
- Palencia General Engineering Services
- Palencia Layout & Evaluate Cost
- Palencia North Guard House & Parcel Development
- Palencia North Preliminary Engineering
- Palencia Site Plan Development - Avila
- Riverpointe - Due Diligence

Hutson Land Company

- Biennial Monitoring Report - Villages of Argyle
- BMR 2010 Villages of Argyle Drive
- BMR Villages of Argyle Drive AFI Parcel & Ranch Village
- CR 210
- Elkton Green
- Hutson Elkton Property
- Johns Creek Phase II, PUD Modifications
- Morocco Temple Site
- Newton Property
- Oakleaf
- Oakleaf Parcel 1 & 5 Master Site Planning
- Pye Wolf Contract Administration
- Silverleaf
- Silverleaf Plan - Stormwater Master Plan
- Water & Sewer Extension
- Wynnfield Lakes CDD

Pulte Homes

- Anderson/Greenbrier
- Arrowood - Bartram
- Avenues Walk
- Bayberry Modifications
- Clifton Village
- Cypress Bay
- Delwebb at Plum Creek
- Fish Island
- Flagler Station
- Greenbrier - Bartram
- Heilow Property/CR 210
- Highwood
- Ironwood
- Marineland Lift Station Rehabilitation
- Midtowne
- Nocatee Oak Hammock
- Nocatee Tidewater
- Silverleaf
- Skinner/Point Meadows
- Summerfield
- Sweetwater-Del Webb
- Twinleaf
- Village Walk

REFERENCES

Below are excerpts from several letters of recommendation we have received from clients that reflect our performance.

"...ETM's professional staff has worked closely with the County to provide planning, design, permitting and construction administration services...It is without hesitation that I recommend ETM, and I am confident that they will provide you with the same outstanding service..."

Faith Alkhatib, PE
Flagler County Engineer

"...ETM's staff has continually exhibited a commitment to maintaining project schedules and providing the necessary resources and technical expertise needed to assure the County's goals and objectives have been met on each work assignment. I am pleased with the professional services they have provided and would highly recommend their services to an agency..."

Shawn Thomas, PE
(Former Clay County) Project Administrator

"... They have routinely provided superior engineering services, based upon the population of engineering firms from whom we process (permit) applications... Based upon their professional execution and responsive character, I am pleased to recommend ETM for any similar services."

David Miracle
SJRWMD Director

"...England-Thims & Miller has been skilled in coordinating with the Florida Department of Transportation and the St. Johns River Water Management District to obtain the necessary permits... I would not hesitate to work with them on future projects."

Alexa Sampselle, PE
(Former City of Palm Coast) Traffic Engineer

"ETM has been skilled at obtaining approvals and permits on behalf of the City by effectively coordinating with the City of St. Augustine, the Florida Department of Environmental Protection, the St. Johns River Water Management District, Florida Department of Transportation and the National Park Service. Their staff members have been professional, responsive and easy to work with, and I would not hesitate to recommend them and work with them on future projects."

Reuben Franklin, PE,
Public Works Director

The PARC Group, Inc.

Subject: Letter of Recommendation
England, Thims & Miller, Inc. (ETM)

To Whom It May Concern,

I have been asked to provide a letter of recommendation for the engineering and design firm of England, Thims & Miller, Inc. ETM has designed and managed more than $200 million in roadway and utility construction for The PARC Group over the past ten years. Since the inception of the Nocatee development, ETM has served as our design and engineering consultant. Their efforts associated with this significant project have always been performed in the most professional manner.

ETM's responsibilities have included master drainage design, utilities, civil engineering, roadway planning and design, project bidding and preparation of programmatic budgets. They are currently engaged in large scale construction administration for our project and have coordinated effectively with regulatory and cooperating agencies including SJRWMD, USACE, FDOT, and JEA for timely project completion. We have found ETM's capability to handle the dynamic requirements in a project with both environmental and public interest to be professional and effective.

I am pleased to recommend England, Thims & Miller, Inc.

Sincerely,

Gregory J. Barbour

4314 Pablo Oaks Court ◆ Jacksonville, Florida 32224 ◆ (904) 992-9750 ◆ (904) 992-4114 FAX

ICI HOMES®

February 28, 2017

To Whom It May Concern:

It is with great pleasure that I write a recommendation for England-Thims & Miller, Inc. Over the last three decades, ICI Homes has built thousands of quality new homes in many of the finest master planned communities in Florida. ETM has supported our success by providing professional engineering services in communities such as Tamaya and Palencia. Their focus, attention to detail, and ability to bring solutions and a willingness to dig in to the many issues, sets them apart.

I have always been impressed with the reliability and level of commitment exhibited by England-Thims & Miller. Their teams are responsive, willing to adjust, and cognizant of program requirements critical to the success of the project. Their knowledge and familiarity with local governing agencies has proven instrumental in obtaining entitlements and permitting approvals from local and state governing agencies. They are currently engaged in large-scale construction administration services for our projects and have coordinated effectively with regulatory and cooperating agencies including SJRWMD, USACOE, FDOT, St. Johns County, City of Jacksonville and JEA.

Their engineering responsibilities have included stormwater master planning and design, utility master planning and design, site development, transportation planning, CEI services, and preparation of programmatic budgets. They are exceptionally qualified to handle peak workloads, ensure proper management and positively impact quality and performance of the end product.

ETM has performed these tasks in a timely, cost-effective, and accurate manner. The work has been completed at the highest professional level with regard to local and state policies and regulations. Based upon their professional execution and responsiveness, I am pleased to recommend ETM.

Sincerely,

M. David Haas
Chief Development Officer

Intervest Construction, Inc.
2379 Beville Road, Daytona Beach, FL 32119 • Voice 386.788.0820 • Fax 386.760.2237 • www. ICI Homes.com

Tolomato Community Development District

14875 Old St. Augustine Road, Jacksonville, Florida 32258
Tel. (904) 288-9130 Fax (904) 288-9187

October 11, 2007

FICE Engineering Excellence Awards
125 South Gadsden Street
Tallahassee, FL 32301-1525
Attn: Kate Ray, IOM

Subject: Town of Nocatee Phase 1
Re: Client/Owner Letter

To Whom It May Concern:

I am pleased to provide this Owner's Letter for the 2008 FICE Engineering Excellence Award. Our engineer is currently designing and managing more than $200 million dollars of roadway and utility construction for the Tolomato Community Development District. Since the inception of the Nocatee development in 1998 our engineer has served as our design and engineering consultant and we are pleased that the same key professionals have remained assigned to our project throughout. Their efforts associated with this significant project have always been performed in the most professional manner.

Their responsibilities have included: stormwater master planning and design, utility master planning and design, transportation planning and design, construction engineering and inspection (CEI) and preparation of programmatic budgets. They are currently engaged in large scale construction administration services for our project and have coordinated effectively with regulatory and cooperating agencies including SJRWMD, USACOE, FDOT, St. Johns County, City of Jacksonville and JEA for timely project completion. We have found their capability to handle the dynamic requirements in a project with both significant environmental and public interest to be professional and highly effective.

Should you have any questions please feel free to contact our office.

Sincerely,

Tolomato Community Development District

RMay

Rick Ray, Chairman
Board of Supervisors

St. Johns River
Water Management District
Hans G. Tanzler III, Executive Director • David W. Fisk, Assistant Executive Director
David Miracle, Jacksonville Service Center Director

7775 Baymeadows Way • Suite 102 • Jacksonville, FL 32256 • (904) 730-6270 • Fax (904) 730-6292
On the Internet at floridaswater.com.

December 21, 2011

SUBJECT: Letter of Recommendation
England-Thims & Miller, Inc.

To Whom It May Concern:

England-Thims & Miller, Inc. (ETM) has provided professional engineering services in North Florida since 1977. During this time, they have submitted thousands of ERP permit applications to our office.

They have routinely provided superior engineering services, based upon the population of engineering firms from whom we process applications. In many cases, the significant projects which are designed by their engineering staff are among the most complex in our area.

Based upon their professional execution and responsive character, I am pleased to recommend ETM for any similar services.

Sincerely,

David L. Miracle, P.E.
Director, Jacksonville Service Center
St. Johns River Water Management District

GOVERNING BOARD

Lad Daniels, CHAIRMAN JACKSONVILLE
John A. Miklos, VICE CHAIRMAN ORLANDO
Douglas C. Bournique, SECRETARY VERO BEACH
Maryam H. Ghyabi, TREASURER ORMOND BEACH

Julington Creek Plantation
Community Development District

950 Davis Pond Blvd. • Jacksonville, Florida 32259 • (904) 287-4180

November 25, 1997

To Whom It May Concern:

The firm of England Thims & Miller has served as District Engineer for the Julington Creek Community Development District since it was formed in October of 1994. In addition to providing general engineering guidance for the District, they have been in charge of major infrastructure development for the District. In that capacity they have been responsible for overseeing the design and provided construction management of the District's recreation and swimpark complex, and full responsibility for the design and construction management (currently underway) for the expansion of State Route 13 and Racetrack Roads.

We have found England Thims & Miller to be a very well qualified and competent engineering firm, and look forward to a continued relationship. We would not hesitate to recommend them to your organization. If have any additional questions, please feel free to contact me at (904) 676-0105.

Sincerely,

Gary R. Walters

Gary R. Walters
District Manager

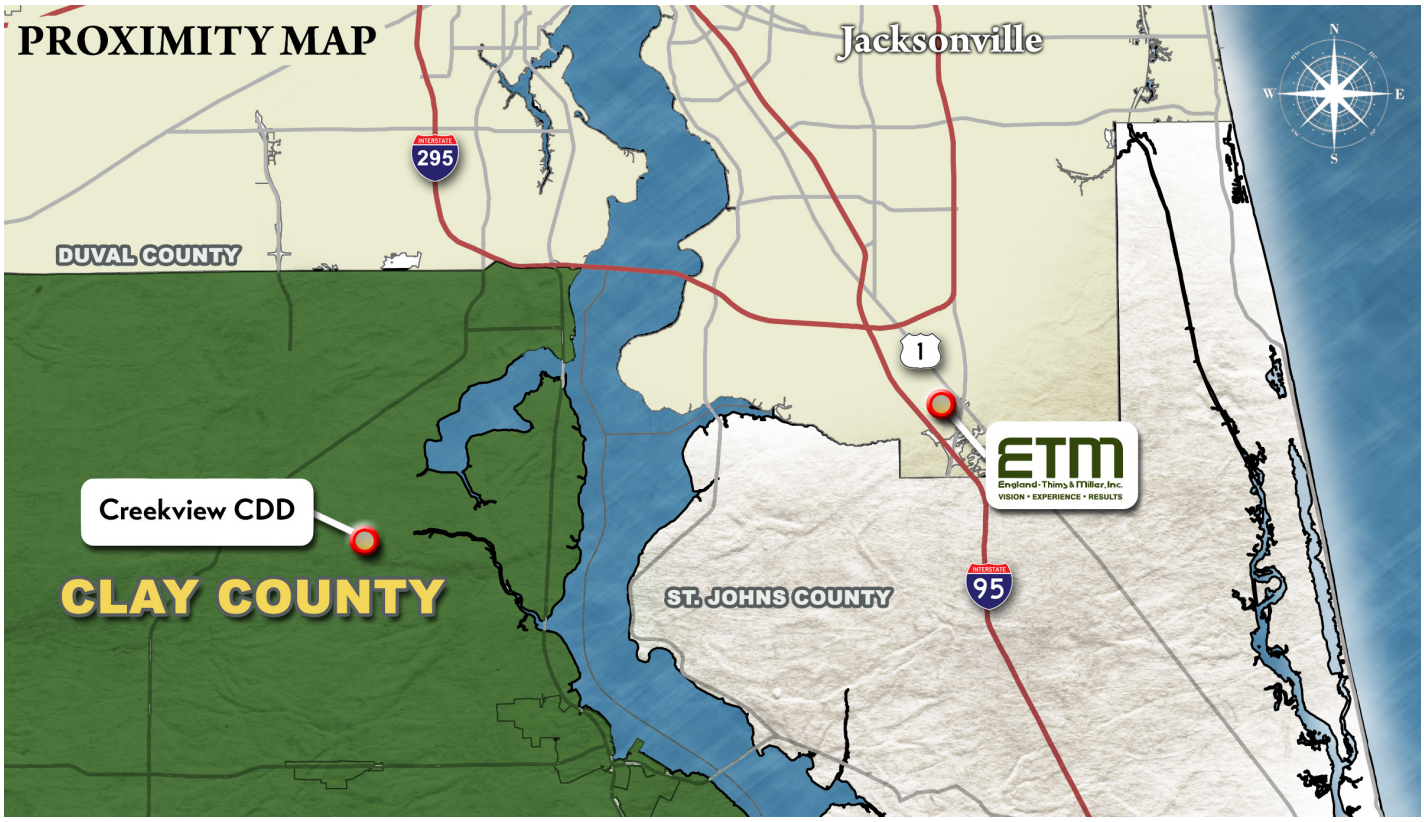
3. Geographic Location

3 GEOGRAPHIC LOCATION

The District Engineer's ability to provide responsive and timely support is critical to the successful execution of this project. All project aspects will be managed from our corporate headquarters in Jacksonville at 14775 Old St. Augustine Road, Jacksonville, Florida 32258.

Our local team of professionals are immediately available to work on this project.

ETM's Project Manager, Bradley Weeber, PE, LEED AP, can quickly respond to meeting requests or field reviews, and staff can be on-site to address needs with approximately half an hours notice.



4. Willingness to Meet Time and Budget Requirements

4 WILLINGNESS TO MEET TIME AND BUDGET REQUIREMENTS

We recognize that the best solutions stem from diverse experiences and perspectives, so we bring together representatives from all facets of our firm to identify effective solutions. In our experience, this level of collaboration has resulted in innovative solutions that create cost saving benefits for our clients.

BUDGETING METHODS

ETM is recognized by our clients for the value we bring to their projects. We are defined by our ability to understand our clients' needs and we provide innovative solutions which render high-quality, cost effective designs. The ability to influence the technical and economic outcome of a project is greatest in the early planning phase. Because of this, we never take shortcuts in the planning process. The small-incremental investments we make in the early planning phases often result in tremendous reductions in engineering and construction costs.

AVAILABILITY

Services provided by ETM will be completed by staff located in Jacksonville. Our team is comprised of local professionals who are immediately available to meet with the stakeholders, coordinate with local permitting agencies, and review projects in the field whenever necessary.

SCHEDULE

Maintaining project schedules to eliminate delay and minimize cost is fundamentally important. The District can rely on ETM to meet all time and budget requirements and maintain a high level of service. We will accomplish this by:

- Developing a detailed work approach
- Developing a detailed schedule
- Identifying potential issues
- Sound project management
- Constant communication
- Principal involvement
- Commitment to effective Project Managers
- Communication between all team members

QUALITY ASSURANCE/ QUALITY CONTROL PROGRAM

In order to meet the needs of our clients, ETM strives to balance three main elements that contribute to a successful project: quality, budget, and schedule. Maintaining project schedules to eliminate delay and minimize cost is fundamentally important and is reflected in our work. However, meeting budget constraints and schedule time frames is meaningless if the deliverables are subpar and lead to construction delays or change orders.

Therefore, adherence to our strict Quality Assurance/Quality Control (QA/QC) procedures is an everyday practice at ETM, regardless of the size of the project and is of such importance that ETM schedules separate QA/QC and constructability reviews prior to each phase submittal.

ETM's emphasis is placed on monitoring the following items:

- The sufficiency and quality of the design
- The proper presentation of the design on the contract documents
- The accuracy of the plans
- Our compliance with the Scope of Services

Quality Assurance Plan

The objective of ETM's Quality Assurance plan is the improvement of our design and production methods to enhance the quality of the services we provide and is comprised of two elements: Quality Control and Internal Peer Review. Our Project Manager, Bradley Weeber, PE, LEED AP, will ensure that company procedures are being followed throughout the life of this contract.

We believe that most effective QA/QC includes maintaining the involvement of senior staff from project beginning to end. Scott Wild, PE, PSM, CFM, and Bradley Weeber, PE, LEED AP will be involved throughout the life of the contract.

Internal Peer Review

To further ensure quality, ETM's Peer Review Committee reviews check prints for each project at least twice during the design phase by the Peer Review Committee composed of subject-matter experts, including two ETM Executive Vice Presidents who ensure compliance with corporate procedures. The Peer Review is an internal quality assurance check which is never billed to our clients.

Constructability Review

Our in-house CEI personnel have tremendous construction experience, and we regularly leverage that experience to help produce efficient construction plans. Constructability reviews will be conducted on the design plans by our Construction Administration Officer, Buckley Williams, CCCA who will be supported by Jeff Brooks. These constructability reviews will focus on construction related efficiency and cost avoidance. These reviews will be conducted prior to each phase submittal to the District.

5. Certified Minority Business Enterprise

5 CERTIFIED MINORITY BUSINESS ENTERPRISE

Although ETM is not a certified Minority Business Enterprise (MBE), we are committed to growing diversity in the engineering and professional services community. We accomplish this in the following ways:

1. Utilizing minority, disadvantaged, and underutilized subconsultant partners.
2. Sponsoring University scholarships focused on minority and disadvantaged individuals entering the profession.
3. Being a leader in the Hispanic business community.
4. Partnering with the FDOT for the Construction Career Days program which is focused on introducing the surveying, engineering, and construction industry to high school students across five counties.

During the last five years, ETM contracted $27 Million to subconsultant firms. Overall $9.5 Million was subcontracted to Minority firms (35.2% of the subconsultant services).

FDOT DBE USAGE		
Year	DBE Usage	Grade
2008	24.98%	A+
2009	18.17%	A+
2010	10.6%	B
2011	17.02%	A+
2012	12.25%	A
2013	15.96%	A+
2014	10.39%	B
2015	28.66%	A+
2016	10.59%	B
2017	20.73%	A+
2018	20.19%	A+
2019	16.30%	A
2020	21.39%	A+
Average: 17.47%		

Diversity within the engineering profession is supported by ETM's identification of opportunities to assist those who may be disadvantaged. One example is our Platinum Sponsorship of the John Delaney Endowment at the University of North Florida. This endowment provides a scholarship each year to minority students pursuing a degree in the field of engineering.

The District's ability to meet applicable MBE utilization goals will be enhanced by our long-standing commitment and proven track record of meeting or exceeding minimum participation requirement established by public agencies.

Our DBE utilization program undergoes extensive audits by the FDOT. The table to the left is a listing of ETM's usage since 2008.

6. Recent, Current and Projected Workloads

6 RECENT, CURRENT, AND PROJECTED WORKLOADS

Our forecasting methods allow us to review backlog, scheduled submittals, and proposed staff commitments. The ETM team has evaluated our current workload and has assessed that we have more than sufficient capacity to continue working as the District Engineer.

Our Client Relations & Project Strategy Officer, Scott Wild, PE, PSM, CFM, as well as our Project Manager, Bradley Weeber, PE, LEED AP, have extensive experience with Community Development Districts (CDDs) and Master Planned Communities. Brad and Scott have established themselves as proven client advocates with an essential understanding of the challenges and opportunities facing the District, and are personally committed to seeing this project through to completion.

There are no known commitments that will conflict with the availability of any of our key personnel on this contract. All team members currently assigned to the District will continue to be assigned, will perform the work, and will be available throughout the life of this contract.

The table shown on the following page indicates the projects currently being performed by the key ETM team members identified in Section 1, the stage of completion, and the projected availability of the team members to support Creekview CDD.

Project Team Members	Current Projects	Stage of Completion	Projected Availability
Scott Wild, PE, PSM, CFM	Tributary	5%	20%
	Six Mile Creek CDD (Trailmark)	60%	
	Creekview Trail	20%	
	Boggy Branch CDD	10%	
Bradley Weeber, PE, LEED AP	Silverleaf	40%	35%
	Cypress Bluff CDD (eTown)	90%	
	Reinhold Residential	20%	
Ann Newland, PE	Grand Reserve Phase 3	60%	35%
	Grand Reserve Phases 5 & 6	30%	
	Silverleaf Parcel 22	50%	
	Holly Landing (Silverleaf Parcel 6)	90%	
Daniel Welch, PE	Silverleaf Parcel 29B-2	65%	45%
	Grand Landings Phase 5	50%	
	Silverleaf Master Stormwater	50%	
	Reinhold Master Stomwater	10%	
Jason Hall, PE	Old Middleburg Road South	60%	55%
	St. Augustine Downtown Improvements	60%	
	Silverlake Drive	90%	
Karl Soderholm, PLA, AICP, LEED AP	East Nassau Stewardship District	15%	30%
	Shipyards	10%	
	Big Island CDD	40%	
Buckley Williams, CCCA	FDOT Continuing Services Contract	15%	30%
	Flagler County Graham Swamp Trail	15%	
	Various Land Development	30%	
Jeff Brooks	Wildlight 1C-2 (Forrest Park)	85%	75%
	Six Mile Creek CDD - Phase 9, 9A, and 9B	5%	
	Brooks Bartram Drive Extension	85%	

7. Volume of Work Previously Awarded

7 VOLUME OF WORK PREVIOUSLY AWARDED

The Creekview CDD requires:

- A high-level thinking approach
- Issue identification
- Solution strategy
- Implementation production
- "Boots on the ground"

ETM is uniquely qualified to serve as District Engineer as we have the necessary experience and can provide the support required, including cost estimates and supplemental engineering reports.

8. Professional Licenses

8 PROFESSIONAL LICENSES

Ron DeSantis, Governor

FBPE FLORIDA BOARD OF PROFESSIONAL ENGINEERS

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

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

WILD, SCOTT ASHLEY
1180 MILL CREEK DRIVE
JACKSONVILLE FL 32259

LICENSE NUMBER: PE47030
EXPIRATION DATE: FEBRUARY 28, 2023
Always verify licenses online at MyFloridaLicense.com

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Ron DeSantis, Governor

FBPE FLORIDA BOARD OF PROFESSIONAL ENGINEERS

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

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

WELCH, DANIEL JACK
14615 MANDARIN ROAD
JACKSONVILLE FL 32223

LICENSE NUMBER: PE87681
EXPIRATION DATE: FEBRUARY 28, 2023
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FBPE FLORIDA BOARD OF PROFESSIONAL ENGINEERS

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

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

WEEBER, BRADLEY LEHMAN
14094 MAHOGANY AVENUE
JACKSONVILLE FL 32258

LICENSE NUMBER: PE70005
EXPIRATION DATE: FEBRUARY 28, 2023
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HALL, JASON TYRON
14775 OLD ST. AUGUSTINE RD
JACKSONVILLE FL 32258

LICENSE NUMBER: PE62467
EXPIRATION DATE: FEBRUARY 28, 2023
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NEWLAND, ANN MARIE
8137 SUMMERSIDE CIRCLE
JACKSONVILLE FL 32256

LICENSE NUMBER: PE59818
EXPIRATION DATE: FEBRUARY 28, 2023
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Ron DeSantis, Governor

Julie I. Brown, Secretary

Florida dbpr

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

BOARD OF LANDSCAPE ARCHITECTURE

THE LANDSCAPE ARCHITECT HEREIN HAS REGISTERED UNDER THE PROVISIONS OF CHAPTER 481, FLORIDA STATUTES

SODERHOLM, KARL M
ENGLAND THIMS & MILLER INC
14775 OLD ST. AUGUSTINE ROAD
JACKSONVILLE FL 32258

LICENSE NUMBER: LA6666736
EXPIRATION DATE: NOVEMBER 30, 2021
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9. Architect-Engineer Standard Form No. 330

ARCHITECT-ENGINEER QUALIFICATIONS

PART I - CONTRACT-SPECIFIC QUALIFICATIONS

A. CONTRACT INFORMATION

1. TITLE AND LOCATION *(City and State)*
Request for Qualifications for Engineering Services for the Creekview Community Development District

2. PUBLIC NOTICE DATE	3. SOLICITATION OR PROJECT NUMBER
September 20, 2021	

B. ARCHITECT-ENGINEER POINT OF CONTACT

4. NAME AND TITLE
Scott Wild, PE, PSM, CFM

5. NAME OF FIRM
England-Thims & Miller, Inc.

6. TELEPHONE NUMBER	7. FAX NUMBER	8. E-MAIL ADDRESS
(904) 642-8990	(904) 646-9485	WildS@etminc.com

C. PROPOSED TEAM

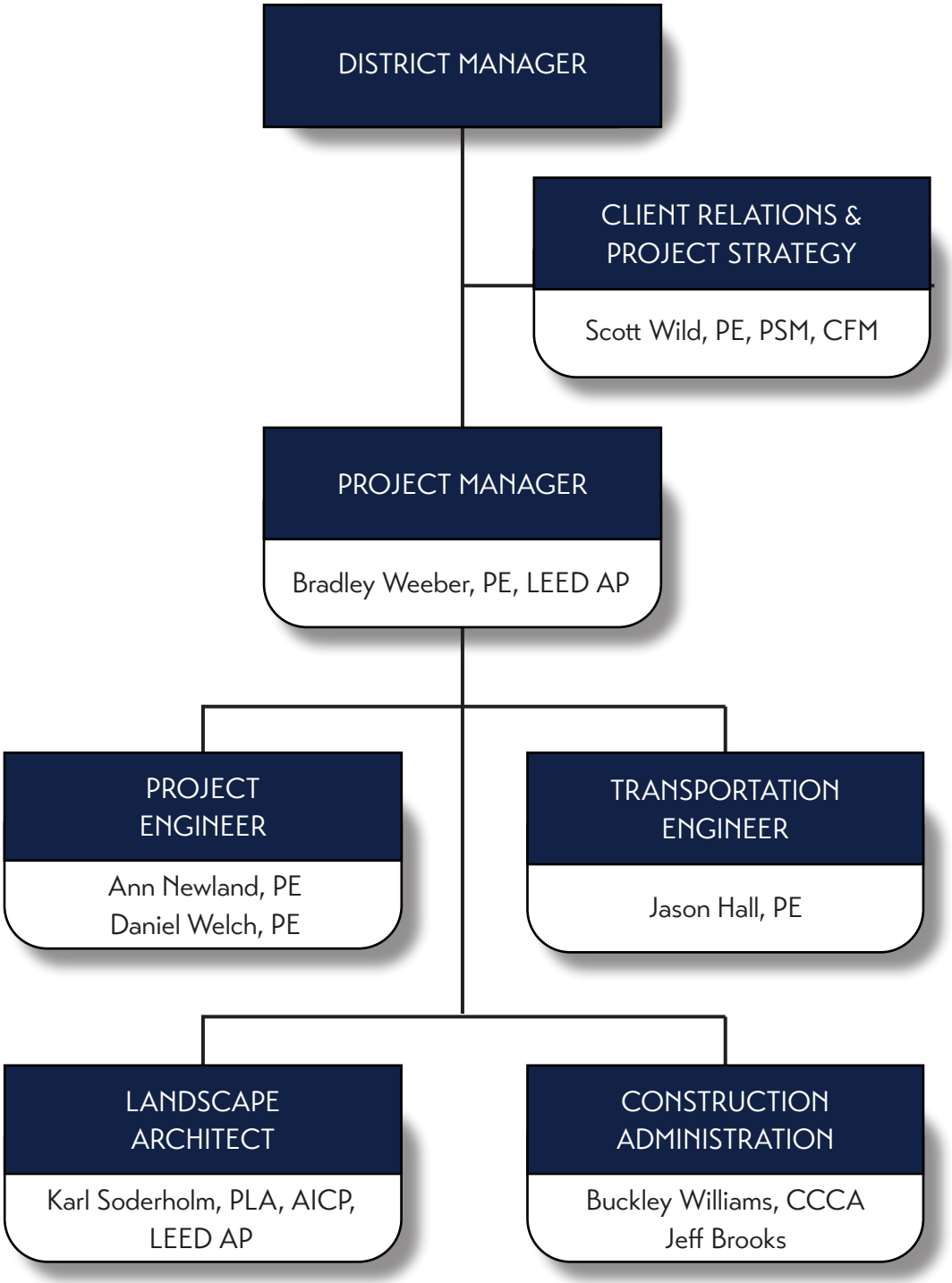
(Complete this section for the prime contractor and all key subcontractors.)

	(Check) PRIME	J-V PARTNER	SUBCON-TRACTOR	9. FIRM NAME	10. ADDRESS	11. ROLE IN THIS CONTRACT
a.	✓			England-Thims & Miller, Inc. ☐ CHECK IF BRANCH OFFICE	14775 Old St. Augustine Road Jacksonville, Florida 32258	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 ☑ *(Attached)*

AUTHORIZED FOR LOCAL REPRODUCTION **STANDARD FORM 330 (REV. 8/2016)**

ORGANIZATIONAL CHART



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
Scott Wild, PE, CFM, PSM	Client Relations & Project Strategy	32	32

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

England-Thims & Miller, Inc. (Jacksonville, Florida)

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*
MS, Environmental Engineering, University of South Florida, 1997 BS, Civil Engineering, University of Florida, 1989	Professional Engineer, Florida No. 47030 Professional Land Surveyor, Florida No. 5077 Certified Floodplain Manager, US-09-04538 Professional Engineer, Georgia No. 41770

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

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Tolomato Community Development District (Nocatee) Ponte Vedra, Florida	Ongoing	

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

QA/QC Principal for the 15,000-acre, 30,000 person mixed-use DRI, which has been ranked as the nation's third best-selling Master Planned Community in the nation. Responsibilities include master planning and engineering of water supply, sewer treatment, stormwater management, roadway construction, and PSC regulated utility.

b.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Aberdeen Community Development District St. Johns County, Florida	2007	

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

District Engineer for this 1,313-acre mixed-use development which includes 60,000-square-feet of commercial space, 40,000 square feet of office space, 1,623 single-family residential units and 395 multi-family units, an elementary school, and 10,000-square-feet of neighborhood center uses. Responsibilities include master planning and design of utilities.

c.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Bartram Springs Community Development District Jacksonville, Florida	Ongoing	

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

District Engineer for this 1,000-acre southeast development which includes 1,400 single-family lots, a multi-family parcel, a retail component, a city park site, an elementary school, and an amenity center. Responsibilities include obtaining concurrency and zoning approvals during the due diligence phase, and providing design and permitting.

d.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Durbin Crossing Community Development District St. Johns County, Florida	2007	

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

District Engineer for this 2,047-acre mixed-use development which includes 100,000-square-feet of commercial space, 70,000-square-feet of office space, 1,551 single-family residential units, 947 multi-family units, and a school.

e.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
South Hampton St. Johns County, Florida	2008	

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

Project Manager for this 900-acre development, which features 779 single-family lots, a McCumber designed golf course, a 10-acre retail outparcel, an amenity area, a golf course clubhouse and a golf course maintenance area. Responsibilities included obtaining concurrency and zoning approvals during the due diligence phase of this 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
Bradley Weeber, PE, LEED AP	Project Manager	15	15

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

England-Thims & Miller, Inc. (Jacksonville, Florida)

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*
MS, Biosystems Engineering, Clemson University, 2005 (summa cum laude) BS, Biosystems Engineering, Clemson University, 2004 (summa cum laude)	Professional Engineer, Florida No. 70005 Professional Engineer, Georgia No. 038317

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

Professional Associations: Northeast Florida Builders Association - Government Affairs Committee, Urban Land Institute, LEED Accredited Professional

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Silverleaf Master Development Plan St. Johns County, Florida		2020

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

Design of master drainage and permitting for an 8,500-acre project which includes 10,700 single family homes and multi-family homes. Responsibilities include coordination with geotechnical and environmental companies, cost estimates of alternatives, and coordination of traffic studies for multiple public roads.

b.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Oakleaf Town Center Community Development District Jacksonville, Florida		2007

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

Responsible for civil engineering of this all-retail District, comprised of 100 acres and 850,000-square feet of commercial retail with bond funds of approximately $10 Million. All engineering was designed to conform to a previously developed master plan.

c.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Oakleaf Regional Park Jacksonville, Florida		2015

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

Responsible for master plan of this 100-acre regional park. This $7.5 Million project includes 12 baseball fields that serve tee-ball, little league, and adult softball facilities.

d.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Nocatee Ponte Vedra, Florida	Ongoing	Ongoing

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

Project Engineer for several projects within Nocatee including parts of Twenty Mile and Lakeside.

e.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Cypress Bluff Community Development District St. Johns County, Florida		Ongoing

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

Project Manager providing a master improvement plan for all master infrastructure associated with the Cypress Bluff CDD including associated cost estimates, exhibits, and calculations.

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
Ann Newland, PE	Project Engineer	25	16

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

England-Thims & Miller, Inc. (Jacksonville, Florida)

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*
BS, Environmental Engineering, University of Florida, 1996	Professional Engineer, Florida No. 59818 Professional Engineer, Georgia No. 028443

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

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Cross Creek Phase 2A Clay County, Florida	Ongoing	Ongoing

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

Project Engineer responsible for providing professional engineering services related to Phase 2 of the existing Cross Creek Subdivision. Phase 2A is a proposed phase consisting of 100 single family lots. This 37.5-acre project in Clay County includes the planning, surveying, engineering, and permitting necessary to develop lots.

b.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Silverleaf Parcel 29A-1, Silver Landing Subdivision St. Johns County, Florida	Ongoing	Ongoing

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

Project Engineer responsible for providing professional engineering services related to the proposed development of a single-family residential and multi-family subdivision with 595-square-foot lots and 216 lots. This 324-acre project located in St. Johns County includes the planning, surveying, engineering, and permitting necessary to develop lots.

c.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Silverleaf Parcel 29A-1, Silver Landing Subdivision St. Johns County, Florida	Ongoing	Ongoing

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

Project Engineer responsible for providing professional engineering services related to the proposed development of a single-family residential subdivision with 446 lots. This 256-acre site is located in St. Johns County off of Silverleaf Parkway. This project includes the planning, surveying, engineering, and permitting necessary to develop lots.

d.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Silverleaf Parcel 18, Meadow Ridge Subdivision St. Johns County, Florida		2020

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

Project Engineer responsible for providing professional engineering services related to the proposed development of a single-family residential subdivision with 195 lots. This 68-acre site is located in St. Johns County, off of St. Thomas Island Parkway. This project includes the planning, surveying, engineering, and permitting necessary to develop lots.

e.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
5th & Cleveland and Forest Street Operable Unit 2 Superfund Alt. Sites Jacksonville, Florida		2008

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

Project Manager responsible for construction administration and management of two phases (parts) of parcel remediation of 283 parcels, residential and commercial parcels, including preparation of individual parcel completion reports.

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 Welch, PE	Project Engineer	6	6

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

England-Thims & Miller, Inc. (Jacksonville, Florida)

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*
BS, Civil Engineering, University of North Florida, 2015	Professional Engineer, Florida No. 87681

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

Professional Associations: Urban Land Institute, Mathcounts

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Silverleaf Plantation Master Drainage Plan St. Johns County, Florida	Ongoing	Ongoing

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

Professional Engineer with responsibilities including master stormwater design and modeling, coordination with geotechnical and environmental companies, cost estimates of alternatives to ensure cost effective design, coordination of traffic studies for multiple public roads through project, and implementation of design changes.

b.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Cross Creek Clay County, Florida	Ongoing	Ongoing

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

Project Manager and Professional Engineer assisting with master development plan submittal, civil engineering construction plans, stormwater collection system design, water and sewer design, utility coordination, regulatory permitting, landscape and irrigation design, and construction representation for the 878-unit subdivision.

c.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Silverleaf Mass Grading St. Johns County, Florida	Ongoing	Ongoing

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

Project Manager and Project Engineer responsible for master stormwater design, civil engineering construction plans, stormwater collection system design, regulatory permitting, and construction representation for multiple parcels throughout Silverleaf totaling over 2,000 acres and over 109 stormwater management facilities.

d.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Creekview Trail Clay County, Florida	2020	Ongoing

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

Project Engineer responsible for master stormwater design, civil engineering construction plans, stormwater collection system design, nutrient analysis, site planning, and regulatory permitting for a proposed 1,000-acre Master Planned Community.

e.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Grand Creek St. Johns County, Florida	2019	Ongoing

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

Project Manager and Professional Engineer assisting with master development plan submittal, civil engineering construction plans, stormwater collection system design, water and sewer design, utility coordination, mass grading design, floodplain analysis, regulatory permitting, and construction representation for the 400-unit subdivision.

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
Jason Hall, PE	Transportation Engineer	21	21

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

England-Thims & Miller, Inc. (Jacksonville, Florida)

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*
BS, Civil Engineering, University of Florida, 2000	Florida Professional Engineer, No. 62467

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

Certifications: Advance Work Zone Certified

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*
Silverleaf Plantation
Jacksonville, Florida

(2) YEAR COMPLETED
PROFESSIONAL SERVICES:
CONSTRUCTION *(If applicable)*: 2020

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

☑ Check if project performed with current firm

Engineer of Record responsible for the Potable Water, Reuse Water, and Sanitary Force Main transmission layout and the design of 2 miles of the internal roadway system for Silverleaf Plantation which is a ±7,285-acre, mixed-use DRI.

b.

(1) TITLE AND LOCATION *(City and State)*
Downtown Improvements District
St. Augustine, Florida

(2) YEAR COMPLETED
PROFESSIONAL SERVICES:
CONSTRUCTION *(If applicable)*: 2015

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

☑ Check if project performed with current firm

Project Manager for the design and permitting for the reconstruction of the three streets and the associated utilities in the Downtown St. Augustine Historic District to match the newly adopted streetscape guidelines. Responsibilities included roadway and drainage design, utility design and coordination, signing, and temporary traffic control.

c.

(1) TITLE AND LOCATION *(City and State)*
Riberia Street Improvements
St. Augustine, 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

Project Manager for the design and permitting of the reconstruction of Riberia Street. The built-out urban conditions required innovative drainage solutions as well as detailed roadway and utility designs. Responsibilities included roadway and drainage design, signing and marking, utility design, maintenance of traffic, permitting, and grant writing.

d.

(1) TITLE AND LOCATION *(City and State)*
Durbin Creek Boulevard
St. Johns County, Florida

(2) YEAR COMPLETED
PROFESSIONAL SERVICES:
CONSTRUCTION *(If applicable)*: 2021

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

☑ Check if project performed with current firm

Project Engineer for the design and reconstruction of approximately 0.6 miles of 2-lane roadway as a 4-lane divided roadway. This design included a roundabout intersection, drainage improvements, and signalization.

e.

(1) TITLE AND LOCATION *(City and State)*
Avenue D
St. Augustine, Florida

(2) YEAR COMPLETED
PROFESSIONAL SERVICES:
CONSTRUCTION *(If applicable)*: 2008

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

☑ Check if project performed with current firm

Project Manager for the design and permitting for the construction of Avenue D, which consisted of a 2-lane undivided urban section and a 4-lane divided urban section. Responsibilities included roadway and drainage design, signing and marking, utility design, maintenance of traffic, permitting, and grant writing support.

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
Karl Soderholm, PLA, AICP, LEED AP	Landscape Architect	22	17

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

England-Thims & Miller, Inc. (Jacksonville, Florida)

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*
BS, Landscape Architecture, University of Florida, 1999	Florida Landscape Architect, No. LA 6666736 Georgia Landscape Architect, No. LA 001522 American Institute of Certified Planners, No. 023714 LEED Accredited Professional; Certified Grant Writer

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

Professional Associations: American Society of Landscape Architects, American Planning Association, Florida Planning, and Zoning Association

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Nocatee Ponte Vedra, Florida	Ongoing	

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

☑ Check if project performed with current firm

Leading Site Planner for Nocatee responsible for developing site plans for many of the projects developed within the DRI including the commercial town center. In addition, he has served as Landscape Architect for the development of several projects within the development.

b.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Cordova Palms DRI St. Johns County, Florida	Ongoing	Ongoing

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

☑ Check if project performed with current firm

The Cordova Palms DRI situated along US 1 is a Master Planned Community of 580 acres. The development program includes 1,700 multi-family units, 1-million-square-feet of retail and office space, as well as an elementary school and public park to serve the needs of the community.

c.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Nocatee Town Center Ponte Vedra, Florida	2008	2010

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

☑ Check if project performed with current firm

Senior Landscape Architect for this project which is a new town covering 14,000 acres of land bridging two counties. Scope of work included conceptual site planning, hardscape, landscape, irrigation design, as well as CEI Services. The first phase of a large planned town center development incorporates significant hardscape and pedestrian elements.

d.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Silverleaf Plantation DRI St. Johns County, Florida	Ongoing	Ongoing

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

☑ Check if project performed with current firm

Silverleaf Plantation DRI is a Master Planned Community encompassing 7,300 acres. Included in the project is the design of 10,700 residential units and 1.7-million-square-feet of retail, office, and light Industrial uses.

e.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Governors Park DRI Clay County, Florida	Ongoing	Ongoing

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

☑ Check if project performed with current firm

The Governors Park DRI situated along the proposed First Coast Outer Beltway in Clay County is a Master Planned Community of 3,200 acres. The development program includes 3.5-million-square-feet of non-residential development, 6,000 residential units, as well as schools and public parks to serve the needs of the community.

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
Buckley Williams, CCCA	Construction Administration	29	28

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

England-Thims & Miller, Inc. (Jacksonville, Florida)

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*
BS, Building Construction, University of Florida, 1992	N/A

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

Certifications: Certified Construction Contract Administrator (CCCA), ASCE Construction Engineering Certificate Program

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Six Mile Creek St. Johns County, Florida		2015

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

Duties included construction management, directing an inspection team, complete utility coordination with BellSouth, Florida Power & Light, Co., Media One, Peoples Gas, and other utility companies, presiding over weekly coordination meetings, shop drawing review, schedule analysis, claims tracking, change order procurement, and monthly reports.

b.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Oakleaf Plantation, Double Branch Community Development District Clay County, Florida		Ongoing

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

Construction Manager responsible for the day-to-day coordination efforts of six residential and connector highway construction projects, including Amenity Site Construction, totaling approximately $22 Million. Responsible for addressing Owner initiatives and the introduction of multiple utility agency infrastructure improvements within limits.

c.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Aberdeen and Durbin Crossing Community Development Districts St. Johns County, Florida		2007

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

Project Administrator for a large subdivision and county roadway project (over $120 Million) located between CR 210 and Race Track Road. His responsibilities included project management, contract administration, and the supervision of inspection staff.

d.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Lower Eastside Drainage Improvement Duval County, Florida		2020

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

Principal-in-Charge for this 900-day project for the City of Jacksonville in downtown. His responsibilities include executive oversight of the ETM inspection workforce, compliance with Plans and Specifications as well as job progress reporting.

e.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Nocatee DRI Duval and St. Johns Counties, Florida		Ongoing

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

Senior Project Manager on a 15,000-acre, 30,000-person, mixed-use DRI. Responsibilities include day-to-day coordination efforts of the complex inspection program including infrastructure improvements such as roadway, stormwater management facilities, water/sewer/reuse utility improvements, bridge, and box culvert improvements.

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 Brooks	Construction Administration	37	8

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

England-Thims & Miller, Inc. (Jacksonville, Florida)

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*

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

CTQP Asphalt Paving Tech Level I & II, CTQP Concrete Field Tech Level I, CTQP Earthworks Inspection Level 2, CTQP Drilled Shaft, ACI Concrete Field Testing Tech Grade I, FDOT Advanced MOT, NPDES FDEP Stormwater Inspector, Hazwoper

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Six Mile Creek St. Johns County, Florida		2015

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

☑ Check if project performed with current firm

Inspector for the Six Mile Creek North project, which is located in the 4,000-acre Six Mile Creek PUD area of the World Golf Village, St. Johns DRI. The project is an exclusive private gated community of single family residential lots, the Laterra Resort, the King and the Bear golf course, clubhouse, restaurant, pro shop, driving range, and practice facility.

b.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Durbin Crossing Community Development District St. Johns County, Florida	2007	

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

☑ Check if project performed with current firm

Inspector for construction services related to the proposed development of 218± townhome units within Durbin Crossing Parcel Y. This 33.5-acre site is located in St. Johns County, just off St. Johns Parkway. This project includes the planning, surveying, engineering, and permitting necessary to develop the townhome units.

c.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Tamaya (Beach) Community Development District Duval County, Florida		2020

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

☑ Check if project performed with current firm

Inspector for construction services related to the Tamaya development. In addition to 2,400 homes, Tamaya will include more than 500,000 square feet of commercial/retail space and a $10 Million amenity center with a 10,000-square-foot clubhouse behind a grand gatehouse and entrance featuring a cascading water element.

d.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Pine Ridge Plantation Clay County, Florida		2021

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

☑ Check if project performed with current firm

Provided construction monitoring services for this multi-phase, planned subdivision in Clay County.

e.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Palencia North St. Johns County, Florida		Ongoing

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

☑ Check if project performed with current firm

Inspector for construction services related to this project along US 1 and International Golf Parkway. The 2,350-acre Master Planned Community offers a full-spectrum of home sites plus ancillary retail and office opportunities along with more than 33 acres of parks, trails, and open areas.

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)* East Nassau Stewardship District Nassau County, Florida	22. YEAR COMPLETED PROFESSIONAL SERVICES Ongoing	CONSTRUCTION *(If applicable)*

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
East Nassau Stewardship District	Mike Hahaj	(904) 321-1030

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

ETM is the District Engineer for the East Nassau Stewardship District, which is a 24,000-acre DRI project that includes 640 acres of commercial development. At total build-out, this project will include 11-million-square-feet of non-residential space, 550,000-square-feet of commercial space, and 24,000 residential units. ETM is responsible for providing engineering reports, cost estimates, and plan review to ensure the proper construction of improvements within the District.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	England-Thims & Miller, Inc.	Jacksonville, 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	
Tolomato Community Development District (Nocatee) St. Johns County, Florida	PROFESSIONAL SERVICES Ongoing	CONSTRUCTION *(If applicable)*

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
The PARC Group	Rick Ray	(904) 992-9750

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

Nocatee is one of the top 10 best selling communities in the nation. This 15,000-acre parcel, at total build-out, will consist of 14,000 residential units, 5-million-square-feet of non-residential space and recreation/open spaces, churches, schools and civic uses. ETM is proud of our involvement in the engineering design, planning and landscape architecture of this project. We have been involved with this project since 1997, when The PARC Group began the conceptual planning process.

In addition to providing the lead design consulting services, ETM was responsible for the design, permitting, and construction management of over 4 miles of Greenway Trails within Nocatee. The trails provide connections between communities, parks and commercial districts. As part of an overall circulation plan within Nocatee, the trails and shared-use paths are 16' wide in order to accommodate pedestrian, bicycle and other typical modes of transportation, including golf carts and low-speed vehicles.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	England-Thims & Miller, Inc.	Jacksonville, 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		
Kindlewood Community Development District Jacksonville, Florida	PROFESSIONAL SERVICES Ongoing	CONSTRUCTION *(If applicable)*	

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
The Hutson Companies	David Hutson	(904) 262-7718

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

ETM was responsible for the master planning of this 10,000-acre DRI project. The project included roadway design, utility design and master stormwater management design and permitting. In 1999, ETM served as Lead Consultant in a major modification to the Argyle Forest DRI.

The land development work included engineering and landscape design of over 5,000 residential units, two amenity centers with each over $7 Million, a regional baseball softball park, a regional soccer park, and over 1-million-square-feet of retail and commercial space. ETM was responsible for the day-to-day coordination efforts of six residential and connector highway construction projects including Amenity Site Construction, totaling approximately $22 Million. This project includes over 10 miles of connector roadway and infrastructure improvements, JEA and Clay County Utility Authority improvements, amenity center construction, box culvert construction, landscape and irrigation improvements, and lot development services.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	England-Thims & Miller, Inc.	Jacksonville, 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 4
21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Bartram Springs Community Development District Jacksonville, Florida	Ongoing	

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Southstar Development Partners, Inc.	Kimball Woodbury	(305) 476-1514

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

Bartram Springs is a 1,400 lot single family development in Southeast Duval County located on the northside of Race Track Road immediately west of Philips Highway. The site is over 1,000 acres, half of which are wetlands that discharge to a Durbin Creek tributary. Additional features and elements include a multi-family parcel, a retail component, a city park site, an elementary school and an amenity area.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	England-Thims & Miller, Inc.	Jacksonville, 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 5
21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED		
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*	
Bartram Park Jacksonville, Florida	Ongoing		

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Eastland Partners	Tom Dodson	(904) 280-7100

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

Bartram Park is a 3,600-acre mixed-use DRI. The project is located in south Duval County and north St. Johns County along I-95. The proposed development consists of 2,000± single-family units, 7,000± multi-family units, 1.3-million-square-feet of commercial space, 1.6-million-square-feet office space, and 330± hotel rooms. As part of the DRI, over 2,00± acres of preservation land was provided along Julington and Durbin Creek.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	England-Thims & Miller, Inc.	Jacksonville, 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 6

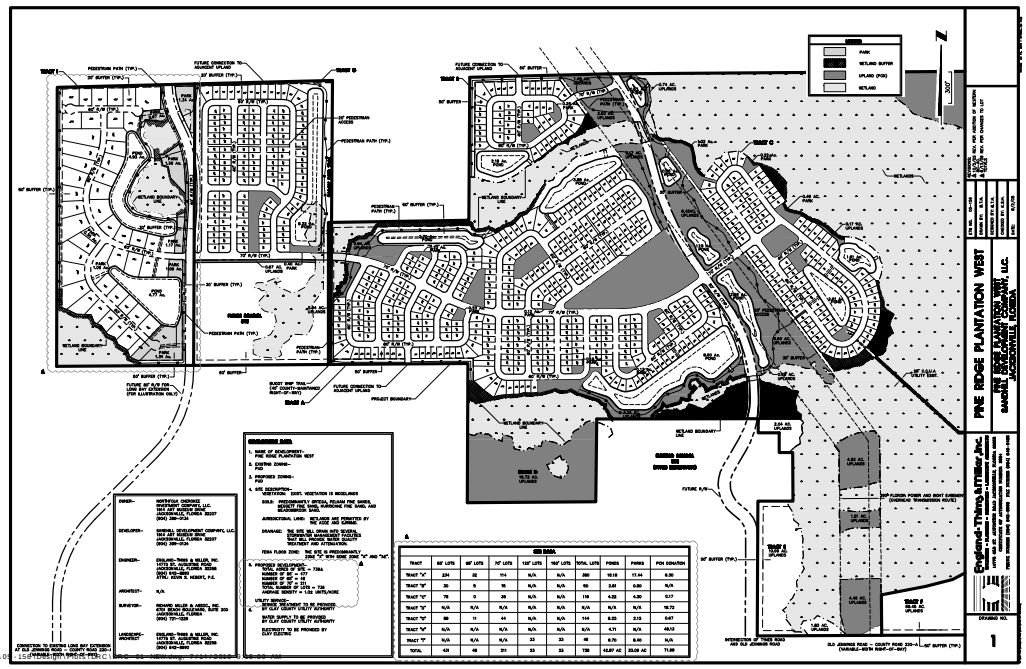
21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Pine Ridge Plantation Clay County, Florida		2021

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Tynes Partners, LLC	Levi Ritter	(904) 399-0134

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

ETM was contracted by Tynes Partners, LLC to provide professional engineering services related to a 116 single family lot subdivision located within the Pine Ridge Development in Clay County. ETM's efforts for this project included master site plan, water and sewer design, stormwater collection system design, roadway design, regulatory permitting, and construction administration.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	England-Thims & Miller, Inc.	Jacksonville, Florida	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)*	
Beach Community Development District Duval County, Florida	Ongoing		

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Beach Community Development District	Jill Cupps	(407) 382-3256

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

ETM was contracted by Beach CDD to provide professional engineering support services related to the operation of the CDD in Duval County. ETM's efforts for this project included coordination with utility providers, coordination with contractors, permitting, engineering services, project management, coordination with surveyors, architects, and other consultants, as well as requisition processing.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	England-Thims & Miller, Inc.	Jacksonville, Florida	District Engineer
b.			
c.			
d.			
e.			
f.			

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
Scott Wild, PE, PSM, CFM	Client Relations & Project Strategy	X	X		X	X		X			
Bradley Weeber, PE, LEED AP	Project Manager	X	X		X	X					
Ann Newland, PE	Project Engineer		X			X					
Daniel Welch, PE	Project Engineer										
Jason Hall, PE	Transportation Engineer	X	X			X					
Karl Soderholm, PLA, AICP, LEED AP	Landscape Architect	X	X	X	X	X					
Buckley Williams, CCCA	Construction Administration	X	X	X	X	X	X	X			
Jeff Brooks	Construction Administration		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	East Nassau Stewardship District	6	Pine Ridge Plantation
2	Tolomato Community Development District	7	Beach Community Development District
3	Double Branch Community Development District	8	
4	Bartram Springs	9	
5	Bartram Park	10	

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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
Scott A. Wild	September 20, 2021

33. NAME AND TITLE

Scott Wild, PE, PSM, CFM, Executive Vice President

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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	England-Thims & Miller, Inc.
3. YEAR ESTABLISHED	1982
4. UNIQUE ENTITY IDENTIFIER	09-783-0251
2b. STREET	14775 Old St. Augustine Road
2c. CITY	Jacksonville
2d. STATE	FL
2e. ZIP CODE	32258
5. OWNERSHIP	
a. TYPE	Corporation
b. SMALL BUSINESS STATUS	N/A
6a. POINT OF CONTACT NAME AND TITLE	Scott Wild, PE, PSM, CFM, Executive Vice President
6b. TELEPHONE NUMBER	(904) 642-8990
6c. EMAIL ADDRESS	WildS@etminc.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
Bassett, England & Thims, Inc.	1977	09-783-0251

9. EMPLOYEES BY DISCIPLINE

a. Function Code	b. Discipline	c. Number of Employees (1) FIRM	c. Number of Employees (2) BRANCH
02	Administrative	44	
08	CADD Technician	18	
12	Civil Engineer	41	
15	Construction Inspector	35	
16	Construction Manager	8	
29	GIS Specialist	9	
39	Landscape Architect	7	
47	Planner: Urban/Regional	4	
48	Project Manager	22	
58	Technician/Analyst	1	
	Survey	66	
	Other Employees		
	Total	255	

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)*
C02	Cemeteries	1
C10	Shopping Center	4
C11	Community Facilities	1
C15	Construction Management	8
E09	Environmental Impact	1
H07	Highway/Streets	5
H09	Hospital & Medical Facilities	2
H11	Housing	6
I01	Industrial Buildings	2
I06	Irrigation/Drainage	2
L03	Landscape Architecture	2
O01	Office Building	1
P05	Planning-Area	3
P06	Planning-Site	6
P07	Land Fills	2
S10	Surveying	2
S13	Storm Water	6
T03	Traffic Engineering	6
U02	Community Development	1
O03	Utilities	2
W02	Ground Water	4
W03	Water Treatment	1

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

(Insert revenue index number shown at right)

a. Federal Work	2
b. Non-Federal Work	9
c. Total Work	9

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: September 20, 2021

c. NAME AND TITLE: Scott Wild, PE, PSM, CFM, Executive Vice President

STANDARD FORM 330 (REV. 8/2016) **PAGE 6**

ETM

England-Thims & Miller, Inc.

VISION ▪ EXPERIENCE ▪ RESULTS

14775 Old St. Augustine Rd.
Jacksonville, FL 32258
☎ 904-642-8990
904-646-9485
www.etminc.com

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

12CII

RFQ for Engineering Services

Creekview Community Development District

contact person

Christopher Potts, PE

Director of Engineering, JBPro
(904) 789-8999 x 1202
chris.potts@jbpro.com

09/20/2021

prepared by

JBrown Professional Group Inc.

4420 US-1 S, Suite 1
St. Augustine, FL 32086

prepared for

Wrathell, Hunt & Associates, LLC

Craig Wrathell, President & Partner
2300 Glades Road, Suite 410W
Boca Raton, FL 33431

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JBPro

01

Letter of Interest

31
Professional Employees

501
Clients Satisfied

2,029
Contracts Completed

26
Years of Experience

Letter of Interest

Dear Creekview CDD:

JBPro is pleased to submit our qualifications for this Creekview Community Development Distract Engineering Services contract. We understand how important a quality professional services consultant is to the success of a district like yours. We believe an experienced and motivated civil engineering partner can assist the district by creating high-quality civil engineering designs that will improve the district's infrastructure and promote economic development opportunities for its citizens. Every aspect of improved infrastructure leads to better community experiences and outcomes for residents, visitors, local businesses, and all other stakeholders in the success of the Creekview CDD. JBPro has established our reputation by providing highly responsive communication, effective project management, and skilled engineering design and permitting services. We work extremely hard to satisfy our client's needs, making their objectives our primary emphasis as we execute our project assignments.

JBPro is experienced in serving community development districts similar to Creekview.

Our staff have previously worked on 17 CDDs for the Villages and the Seminole Improvement District, and we are currently the District Engineer for Tara Forest CDD and serving on the board of Tara Oaks CDD.

The Villages network of CDDs are, of course, one of the most notable collections of CDDs in the State of Florida, and our staff's experience working as the District Engineer of those CDDs have made us uniquely capable of serving Creekview CDD as its district engineer. We are currently performing both surveying and civil engineering work for the Tara Forest CDD and are capable of providing a wide-range of services as a consultant to Creekview CDD. In addition to core civil engineering services, we provide land planning, surveying, and construction services, including full-service Construction Engineering and Inspection (CEI) services. We offer plan review for engineering plans, planning review, and plat and survey review.

Letter of Interest

JBPro is a small business enterprise (SBE), but we are not a small engineering group. We have a strong staff of nine civil engineers with extensive experience and expertise. We have additional engineering technician support staff and work closely with our Surveying and Planning Departments, who support our engineers in those disciplines. Our engineering teams are available to assist the Creekview CDD with any type of civil engineering projects. We have a significant portfolio of both public and private work. In the public sector, we have completed major utility infrastructure, stormwater remediation, roadway and streetscape, parks and recreation, and capable building projects. We have also completed residential, commercial, and mixed-use projects. Our projects include Depot Park, the central park of Gainesville, FL, and Town of Tioga, one of the preeminent planned developments in all of North Central Florida.

To make our projects successful, we pay particular attention to schedule and budget. We know how important those two aspects are to our clients, so we make sure they are just as important to us. To increase our efficiency, both on timeline and budget, we also work closely with our in-house surveying department. Integrating the up-front topographic surveying needs of a project in a collaborative manner is seamless for us. This is often critical to the success and timeliness of our projects. We make sure to hit the ground running when a survey is completed, so that we have as much time as possible to focus on design excellence, value engineering, and communication with our client.

With our team of expert engineers, we understand how providing timely responses to project assignments is a crucial component of being the District Engineer for the Creekview CDD. At JBPro, we make our community development district clients our top priority and we pride ourselves on prompt and effective communication and response times.

We can commit to the Creekview CDD that you will receive very prompt service from our staff with every request no matter the type, size, or scope of the project. Please review the submittal information we have included, documenting our excellent project team staff and our extensive project experience. We hope you will conclude that we are a great choice to assist you with your future professional services needs. We feel strongly that we can earn your trust by helping you achieve great outcomes and successful projects.

Sincerely,

Christopher Potts

Christopher Potts, PE
Director of Engineering, JBPro

JBPro

02

Company Profile

31
Professional Employees

501
Clients Satisfied

2,029
Contracts Completed

26
Years of Experience

Company Information

Overview

JBPro was originally established as Brown & Cullen, Inc. in 1995, and was renamed JBrown Professional Group Inc. in 2013. We rebranded in 2020 and are now referred to by our brand identify of JBPro. Throughout our 26 years, JBPro has been led by Jay Brown, our founder, who leads the company and provides a vast array of design and project experience. The firm has grown from a staff of 2 in the summer of 1995 to over 30 employees in the fall of 2021.

Corporate Information

Business Type S-Corporation
Regionality Local
Date of Incorporation 09/20/2013
Annual Report Filed 02/05/2021

Years in Business

8 years as JBrown Professional Group Inc.
26 years total (succeeded Brown & Cullen, Inc.)

Phone (904) 789-8999
Toll Free (844) Go-JBPro
Fax (352) 375-0833
Email contact@jbpro.com
Website jbpro.com
Address 4420 US-1 S, Suite 1
St. Augustine, FL 32086
Hours Weekdays 8AM-5PM

Throughout our 26 years of activity JBPro has staked its reputation on a genuine commitment to our clients and producing high-quality design work. We work hard for our clients and we make sure their projects are successful. We know how to meet schedules and budgets, and, throughout our history, we have developed loyalty with repeat clientele.

We have held multiple continuing services contracts for over a decade in North Florida and our staff has extensive experience providing community development districts with engineering services.

Our engineering staff is well trained, experienced, and highly responsive. We have received local, statewide, and national awards for our project designs with many of our projects receiving Gainesville Beautification awards. Our Depot Park project won an Outstanding Environmental Project Award locally, and our SW 9th Street Roadway project received the APWA statewide and national awards as the Transportation Project of the Year ($5M or Less). Our employees have been officers of the local ASCE chapter and have been active with local charitable organizations and Boards. Our company received a Founder's Award from Millard Fuller, the founder of Habitat for Humanity for service to the organization. We value our commitment to community and our clients and hope to serve the Creekview Community Development District with our best efforts in the years to come.

Location & Minority Business Status

Location

JBPro will serve the Creekview Community Development District from our St. Augustine, FL office, which is only is only 28 miles from Clay County. From this location, JBPro will be well-suited to serve the CDD, easily within driving distance for site visits and on-premise meetings. JBPro also has an office in Gainesville, FL and will be able to provide support services from that office as well. The Gainesville office is also within a comfortable driving range from the Creekview Community Development District, so the district will have two JBPro offices at its service. While JBPro and our staff have extensive CDD experience overall, the St. Augustine office does not currently have an existing relationship with a CDD, so it would make the Creekview Community Development District its top priority.

Minority Business Status

While JBPro is not a certified minority-owned business at this time, we value diversity, equity, and inclusion in every part of our organization, and we are proud to be a Certified Small Business Enterprise in Alachua County.

Previous Work & Company Character

Previous Work Volume

JBPro staff has experience working with exactly twenty (20) community development districts, but JBPro has not worked with Creekview Community Development District to date. The Creekview RFQ for Engineering Services places specific emphasis on valuing diversity of the firms that receive work from the district, and we believe JBPro has the perfect balance of experience and originality. Since JBPro hasn't worked with the district, we would be able to diversify the firms that have worked for the district and bring in a new level of design excellence and client advocacy to Creekview. At the same time, we'd be able to draw on our experience serving as the District Engineer for a number of other CDDs throughout North and Central Florida.

Character, Integrity, & Reputation

Character, integrity, and reputation are at the heart of JBPro. We put our client at the center of our work effort at all times and strive to do the best design and permitting work we possibly can without compromising our ethics. By following those principles, we have developed incredible relationships not only with our clients but with the permitting agencies that we work with. From the very founding of our company, we learned that working with permitting agencies and other public offices was paramount to our success. While many engineering firms are combative with the public sector, we take a collaborative approach, considering all stakeholders and showing respect. This has garnered us a great reputation with both our clients and the counties and municipalities we work within. JBPro has never committed any public entity crime and always respect public processes. It for these reasons that we have many public continuing services contracts, extensive experience with CDDs, and plan an engineering plan review contract from a nearby municipal government. We are held in high esteem by clients and agencies alike.

Please reach out to our references provided later in this qualifications document to verify our character, integrity, and reputation. We have full confidence that Creekview CDD staff would be impressed by the feedback our references provide on our collaborative approach to designing and permitting our engineering projects.

Primary Services

Civil Engineering

We provide safe, efficient, cost-effective designs that are built to last. Our clients can depend on us to provide creative and thorough design documents for all of their infrastructure needs while optimizing functionality and aesthetic appeal.

Surveying

We offer a full range of surveying services to support all of your geospatial and construction needs, and we have the expertise to ensure the highest accuracy and data integrity from all of our surveying solutions.

Land Planning

We believe successful projects begin with great planning. Our staff draws on our extensive experience and creative design skills to provide up-front layouts that lead to positive outcomes for our clients. We thoroughly research and plan our projects throughout the entire project.

Construction Services

We are committed to providing thorough and timely construction services to assist throughout the construction process. We help administer construction contracts, inspect construction work and help manage issues that develop throughout the construction process.

GTEC
Gainesville, FL

Certificate of Corporate Status

State of Florida
Department of State

I certify from the records of this office that JBROWN PROFESSIONAL GROUP INC. is a corporation organized under the laws of the State of Florida, filed on September 20, 2013.

The document number of this corporation is P13000078056.

I further certify that said corporation has paid all fees due this office through December 31, 2021, that its most recent annual report/uniform business report was filed on February 5, 2021, 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 Fifth day of February, 2021

Secretary of State

Tracking Number: [illegible]

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

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

Business Occupational License

This Receipt is issued pursuant to County ordinance 87-36

2021/2022 ST. JOHNS COUNTY LOCAL BUSINESS TAX RECEIPT

MUST BE DISPLAYED IN A CONSPICUOUS PLACE

Account 1090027

EXPIRES September 30, 2022

Business Type Surveyor

Location 4420 S U S 1 # 1
St Augustine FL 32086

New Business
Transfer

Business Name **JBrown Professional Group Inc**

ST. JOHNS COUNTY TAX COLLECTOR
DENNIS W. HOLLINGSWORTH, CFC

Tax	30.00
Penalty	0.00
Cost	0.00
Total	**30.00**

Owner Name JBrown Professional Group Inc

Mailing Address 3530 NW 43rd Street
Gainesville FL 32606

DENNIS W. HOLLINGSWORTH
ST. JOHNS COUNTY TAX COLLECTOR

This receipt does not constitute a franchise, an agreement, permission or authority to perform the services or operate the business described herein when a franchise, an agreement, or other county commission, state or federal permission or authority is required by county, state or federal law.

This form becomes a receipt only when validated below

Paid by receipt(s) 2020-901817 on 09/01/21 for $30.00

JBPro

03

Personnel & References

31
Professional Employees

501
Clients Satisfied

2,029
Contracts Completed

26
Years of Experience

Design Team Overview

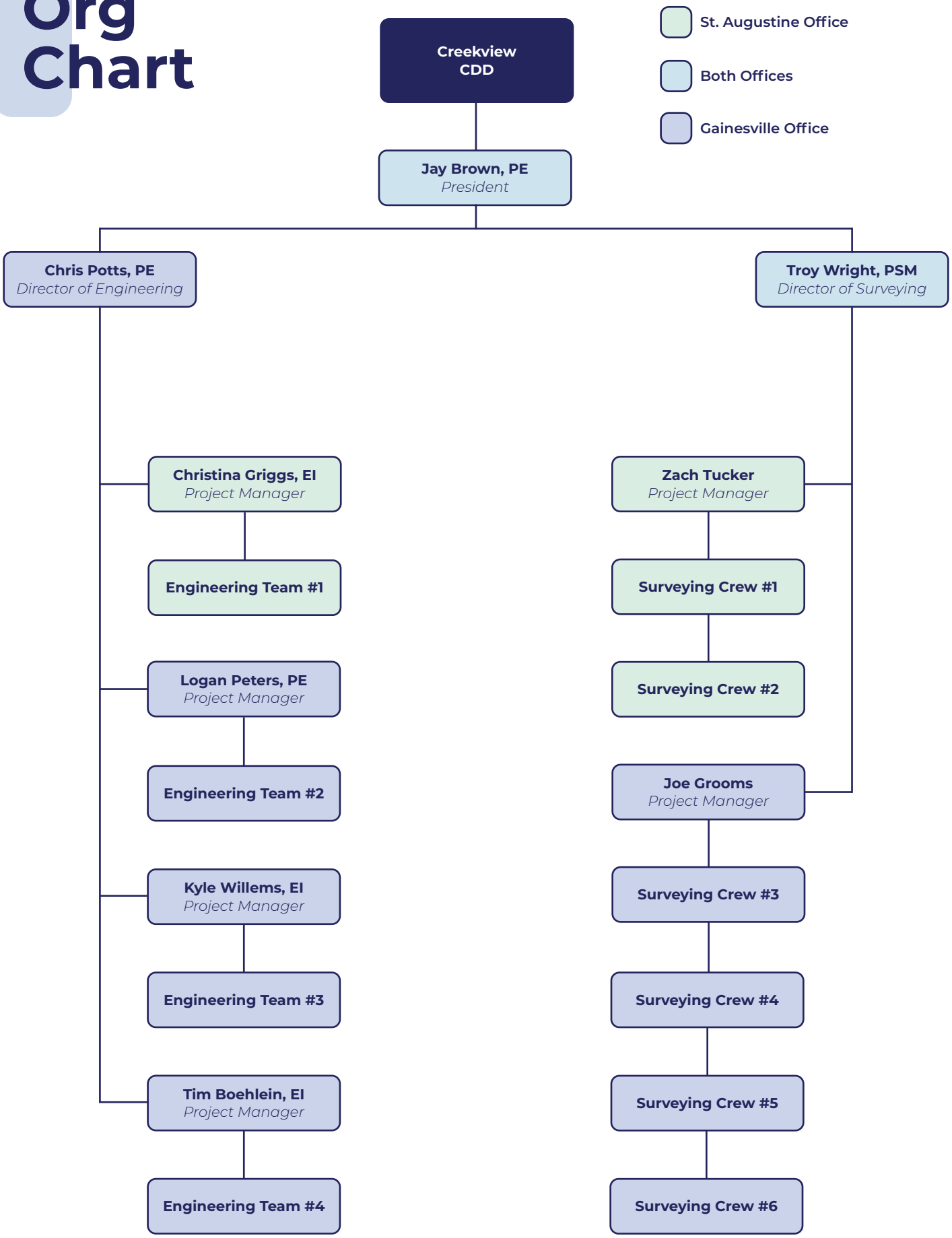
A Family of Skilled and Dedicated Professionals

JBPro provides civil engineering, surveying, and land planning professional services to our primary service area in North and Central Florida. The JBPro staff includes a total of 32 employees. The engineering department includes 10 staff members, of which 9 are graduate engineers. The surveying department includes 18 staff members, 6 office staff and 12 field staff. Additionally, there are 3 staff members in the Administration Department and 1 Urban Planner on staff.

JBPro has grown steadily over the past several years due to a consistent demand for our services. We have implemented a strategic vision for continued growth into the future. JBPro has developed a strong management and leadership team consisting of the Company President, Jay Brown, PE and the Department Directors: Chris Potts, PE - Director of Engineering, Troy Wright, PSM - Director of Surveying, and Michael Brown - Director of Administration.

An organization chart of our company and resumes of key staff are included in the following pages.

Org Chart


Creekview CDD
St. Augustine Office
Both Offices
Gainesville Office
Jay Brown, PE
President
Chris Potts, PE
Director of Engineering
Troy Wright, PSM
Director of Surveying
Christina Griggs, EI
Project Manager
Engineering Team #1
Logan Peters, PE
Project Manager
Engineering Team #2
Kyle Willems, EI
Project Manager
Engineering Team #3
Tim Boehlein, EI
Project Manager
Engineering Team #4
Zach Tucker
Project Manager
Surveying Crew #1
Surveying Crew #2
Joe Grooms
Project Manager
Surveying Crew #3
Surveying Crew #4
Surveying Crew #5
Surveying Crew #6

Christopher Potts PE, LEED GA

Director of Engineering

Christopher Potts has been a licensed Professional Engineer since 2011. Chris has experience in the implementation of Improvement Districts in Florida, along with a comprehensive knowledge-base of land development projects, focusing on design, permitting, master planning, utility design and system modeling, roadway design and stormwater drainage design. Chris has worked extensively with the public and private sector, providing solutions to their development needs.

Project Experience

The Villages CDDs *The Villages, FL*
Served as District Engineer for all 17 of the special purpose districts in The Villages, which covers 32 square miles, approximately 17,000 acres, and over 55,000 residential units. The districts construct and maintain a number of types of public infrastructure including water, sewer, drainage, irrigation, parks, and recreation facilities.

Tara Forest CDD *Alachua, FL*
Designed 1,200 residential lots and over 44 acres of a mixed-used development with roadway, stormwater management, and utility infrastructure improvements. Coordinated with the owner on preparing the estimated development cost for the engineer's report and the supporting documents for the petition to create the CDD with the City of Alachua.

Seminole Improvement District *Westlake, FL*
Served as District Engineer for the Seminole Improvement District (SID). Oversaw construction and maintenance of a number of types of public works and utilities including water, sewer, drainage, irrigation, water management, parks, recreation facilities, and roadways.

Town of Tioga *Tioga, FL*
Serves as the project manager for a major planned development neighborhood and town center that currently consists of a seven-phase town center and a 21-phase single-family subdivision. Currently, JBPro is master planning a 216.12 acre southeastern expansion of the planned development.

Tara Oaks CDD *Leesburg, FL*
As a Board Member, JBPro participated in the initial board meetings and voting for the creation, budgets, bonding, and Engineer's Report. The development consists of 1,200 homesites near Leesburg, Florida.

Education

B.S. Civil Engineering,
University of Florida (2007)

Certifications

Professional Engineer,
Florida License #PE73842

LEED Green Associate

Memberships

American Society of
Civil Engineers

A.J. "Jay" Brown Jr. PE

President, Principal

Mr. Brown is the President and Principal Civil Engineer with JBrown Professional Group Inc. (JBPro). He has over 35 years of experience in civil engineering design and project management and expertise in a wide array of civil engineering project types.

Project Experience

Tara Forest CDD *Alachua, FL*
Served as District Engineer for all 17 of the special purpose districts in The Villages, which covers 32 square miles, approximately 17,000 acres, and over 55,000 residential units. The districts construct and maintain a number of types of public infrastructure including water, sewer, drainage, irrigation, parks, and recreation facilities.

Town of Tioga *Tioga, FL*
Serves as the project manager for a major planned development neighborhood and town center that currently consists of a seven-phase town center and a 21-phase single-family subdivision. Currently, JBPro is master planning a 216.12 acre southeastern expansion of the planned development.

Depot Park *Gainesville, FL*
This project required significant environmental remediation efforts to turn a 33-acre brownfield reclamation area into downtown Gainesville's premier multi-use recreational park. The design included a stormwater park with promenade, paved paths, pavilions, playgrounds, a splash pad, and stage facilities.

City of Alachua Plan Review Services *Alachua, FL*
JBPro has provided the City of Alachua with third-party engineering review of site plan submittals since 2014. JBPro has completed 51 total reviews and 23 major site plan reviews in the last two years. The plans are reviewed to ensure the land development regulations of the City are met and the engineering or plat design complies with local and state standards.

SW 9th Street *Gainesville, FL*
A new concession and restroom building was constructed to serve the athletic facilities for sporting events at St. Francis Catholic Academy. JBPro designed and permitted the new facility as well as the site layout. JBPro had prepared a previous master plan for the athletic fields and had pre-planned utility stub-outs to serve the future building location.

Education

B.S. Civil Engineering,
University of Florida (1986)

Post-Baccalaureate Studies,
University of Florida (1986-87)

Certifications

Professional Engineer,
Florida License #PE43879

Memberships

American Society of
Civil Engineers

Builder's Association of
North Central Florida,
Board of Directors

Logan Peters PE

Project Manager

Logan Peters earned her Bachelor of Science in Civil Engineering from the University of Florida in 2012 and joined JBPro in April 2013. She is a Florida Licensed Professional Engineer, and specializes in subdivision and stormwater design. Logan has experience with both the public and private sectors with a wealth of knowledge of land development design and permitting.

Project Experience

Tara Forest CDD *Alachua, FL*
Designed 1,200 residential lots and over 44 acres of a mixed-used development with roadway, stormwater management, and utility infrastructure improvements. Coordinated with the owner on preparing the estimated development cost for the engineer's report and the supporting documents for the petition to create the CDD with the City of Alachua.

Depot Park *Gainesville, FL*
This project required significant environmental remediation efforts to turn a 33-acre brownfield reclamation area into downtown Gainesville's premier multi-use recreational park. The design included a stormwater park with promenade, paved paths, pavilions, playgrounds, a splash pad, and stage facilities.

UF-642 SW Transportation Improvements *Gainesville, FL*
This project involves a full redesign of several major transportation corridors, the undergrounding of extensive overhead electric distribution networks, and the design and installation of two new roundabouts at congested intersections on the UF campus.

St. Anne Early Learning Center *Gainesville, FL*
The learning center building was 19,000 SF and was the primary development in a planned commercial center that will accommodate an additional 10,000 SF building. The school was designed to accommodate 260 students. The site was master planned by JBPro including wetland impacts, master stormwater management and utility infrastructure, and shared parking.

SW 9th Street *Gainesville, FL*
This project was designed as a "green" road, using the latest in urban design concepts to provide a pedestrian-friendly space. A new pocket park was incorporated into the design, which includes a large bio-retention facility with multiple retention cells cascading into one another.

Education

B.S. Civil Engineering,
University of Florida (2012)

Registrations

Professional Engineer,
Florida License #PE88516

Florida Engineering Society

National Society of Professional Engineers

National Home Builder's Association

Builder's Association of North Central Florida

Troy Wright, PSM

Director of Surveying

Mr. Wright has extensive and diversified experience that includes digital imaging and mapping, geodesy, GIS, GPS, photogrammetry, land tenure and cadastral studies, Lidar, and remote sensing. He provides hydrographic, ALTA, full topographic, and boundary surveys, sub-surface utility locating, and construction layout and has served in the full spectrum of survey positions: as a rod person, instrument operator, crew chief, and has performed data processing using AutoCAD, Microstation, CAiCE, Cyclone, Trimble Business Center, and GeoPAK. Mr. Wright has experience and knowledge in both Leica and Trimble operating systems, various types of equipment, and Processing software.

Project Experience

Tara Forest CDD *Alachua, FL*
Surveyed 1,200 residential lots and over 44 acres of a mixed-used development with roadway, stormwater management, and utility infrastructure improvements. Coordinated with the owner on preparing the boundary survey and plat, for the petition to create the CDD with the City of Alachua.

Town of Tioga *Tioga, FL*
Serves as the Principal Surveyor for a major planned development neighborhood and town center that currently consists of a seven-phase town center and a 21-phase single-family subdivision. Currently, JBPro is surveying a 216.12 acre southeastern expansion of the planned development.

City of Alachua Plan Review Services *Alachua, FL*
JBPro has provided the City of Alachua with third-party surveying review of plat submittals since 2014. JBPro has completed 51 total reviews and 23 major site plan reviews in the last two years. The plans are reviewed to ensure regulations of the City are met and the surveying or plat design complies with local and state standards

UF-642 SW Transportation Improvements *Gainesville, FL*
This project involves a full redesign of several major transportation corridors, the undergrounding of extensive overhead electric distribution networks, and the design and installation of two new roundabouts at congested intersections on the UF campus.

St. Anne Early Learning Center *Gainesville, FL*
The learning center was 19,000 SF and was the primary development in a planned commercial center that will accommodate an additional 10,000 SF building. The site was surveyed by JBPro to prepare for wetland impacts, master stormwater management, utility infrastructure, and shared parking.

Education

B.S. Geomatics Engineering, Florida Atlantic University (2011)

Certificate of Completion, Underground Utility Designation Staking University, 2014

MOT Certified – FDOT, 2015

Trimble Training – 2011 to 2015

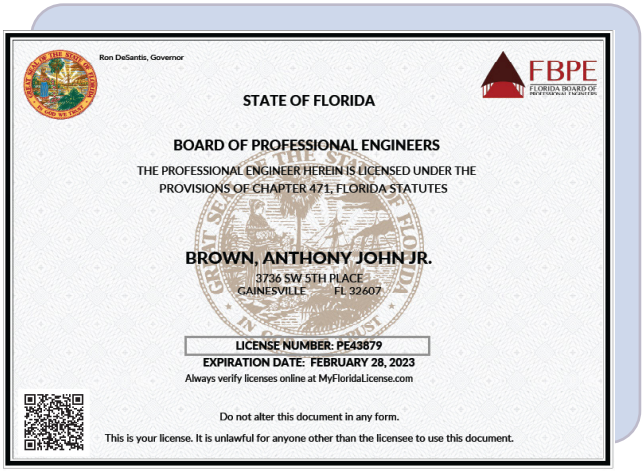
Certifications

Professional Surveyor & Mapper, License #LS7210

Statement on Company Engineering Licensure

As of October 1, 2019, the Florida Board of Professional Engineers instated new rules affecting Certificates of Authorization for all engineering firms in Florida. The new law changes Section 471.023, Florida Statutes. It replaces the existing Certificate of Authorization for engineering firms with a registry. Engineering firms will no longer be required to apply for a Certificate of Authorization and pay a fee. Instead, firms must register their business with the Board and be qualified by a Professional Engineer licensed in Florida. The Professional Engineer licenses on the following page serve as registration for JBPro to practice engineering.

Employee Engineering Licenses



Ron DeSantis, Governor

FBPE
FLORIDA BOARD OF PROFESSIONAL ENGINEERS

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

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

BROWN, ANTHONY JOHN JR.
3736 SW 5TH PLACE
GAINESVILLE FL 32607

LICENSE NUMBER: PE43879
EXPIRATION DATE: FEBRUARY 28, 2023
Always verify licenses online at MyFloridaLicense.com

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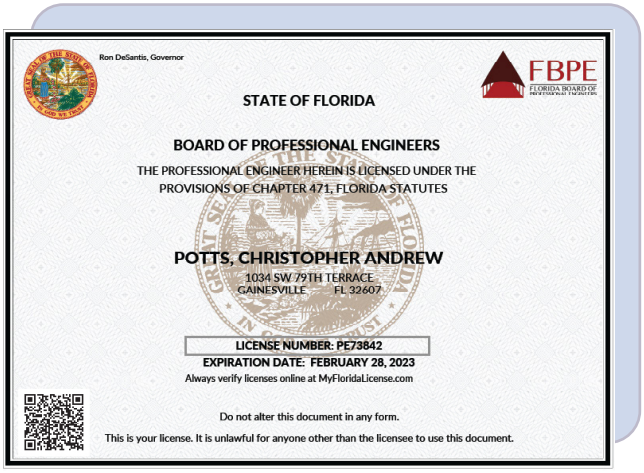

Ron DeSantis, Governor

FBPE
FLORIDA BOARD OF PROFESSIONAL ENGINEERS

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

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

POTTS, CHRISTOPHER ANDREW
1034 SW 79TH TERRACE
GAINESVILLE FL 32607

LICENSE NUMBER: PE73842
EXPIRATION DATE: FEBRUARY 28, 2023
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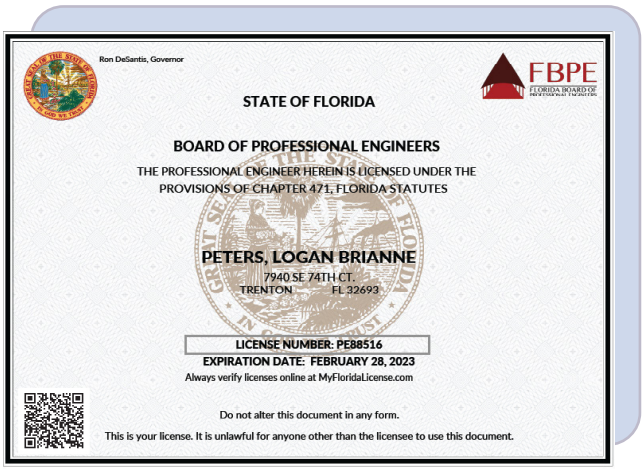

Ron DeSantis, Governor

FBPE
FLORIDA BOARD OF PROFESSIONAL ENGINEERS

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

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

PETERS, LOGAN BRIANNE
7940 SE 74TH CT.
TRENTON FL 32693

LICENSE NUMBER: PE88516
EXPIRATION DATE: FEBRUARY 28, 2023
Always verify licenses online at MyFloridaLicense.com

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LEED GA Certifications

LEED GREEN ASSOCIATE

GREEN BUSINESS CERTIFICATION INC. CERTIFIES THAT

Christopher Potts

HAS ATTAINED THE DESIGNATION OF

LEED® Green Associate™

by demonstrating the knowledge and understanding of green building practices and principles needed to support the use of the LEED green building program.

11381297-GREEN-ASSOCIATE

CREDENTIAL ID

07 SEP 2020

ISSUED

06 SEP 2022

VALID THROUGH

Mahesh Ramanujam

MAHESH RAMANUJAM
PRESIDENT & CEO, U.S. GREEN BUILDING COUNCIL
PRESIDENT & CEO, GREEN BUSINESS CERTIFICATION INC.

LEED GREEN ASSOCIATE

GREEN BUSINESS CERTIFICATION INC. CERTIFIES THAT

Timothy Boehlein

HAS ATTAINED THE DESIGNATION OF

LEED® Green Associate™

by demonstrating the knowledge and understanding of green building practices and principles needed to support the use of the LEED green building program.

11377854-GREEN-ASSOCIATE

CREDENTIAL ID

14 JUL 2020

ISSUED

13 JUL 2022

VALID THROUGH

Mahesh Ramanujam

MAHESH RAMANUJAM
PRESIDENT & CEO, U.S. GREEN BUILDING COUNCIL
PRESIDENT & CEO, GREEN BUSINESS CERTIFICATION INC.

Company & Employee Surveying Licenses

Florida Department of Agriculture and Consumer Services
Division of Consumer Services
Board of Professional Surveyors and Mappers
2005 Apalachee Pkway Tallahassee, Florida 32399-6500
800HELPFLA(435-7352) or (850) 488-2221

February 27, 2021

TROY V WRIGHT
3530 NW 43RD ST
GAINESVILLE, FL 32606-6104

SUBJECT: Professional Surveyor and Mapper License # LS7210

Your application / renewal as a professional surveyor and mapper as required by Chapter 472, Florida Statutes, has been received and processed.

The license appears below and is valid through February 28, 2023.

You are required to keep your information with the Board current. Please visit our website at www.800helpfla.com/psm to create your online account. If you have already created your online account, you can use the website to maintain your license. You can also find other valuable information on the website.

If you have any questions, please do not hesitate to call the Division of Consumer Services, Board of Professional Surveyors and Mappers at 800-435-7352 or 850-488-2221.

Detach Here

Florida Department of Agriculture and Consumer Services
Board of Professional Surveyors and Mappers

LS7210

Professional Surveyor and Mapper
TROY V WRIGHT

IS LICENSED under the provisions of Ch. 472 FS
Expiration date: February 28, 2023

Detach Here

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.: **LS7210**
Expiration Date February 28, 2023

Professional Surveyor and Mapper License
Under the provisions of Chapter 472, Florida Statutes

TROY V WRIGHT
3530 NW 43RD ST
GAINESVILLE, FL 32606-6104

nicole fried

NICOLE "NIKKI" FRIED
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 Agriculture and Consumer Services
Division of Consumer Services
Board of Professional Surveyors and Mappers
2005 Apalachee Pkway Tallahassee, Florida 32399-6500
800HELPFLA(435-7352) or (850) 488-2221

March 2, 2021

JBROWN PROFESSIONAL GROUP INC.
3530 NW 43RD ST
GAINESVILLE, FL 32606-6104

SUBJECT: Professional Surveyor and Mapper Business Certificate # LB8031

Your application / renewal as a professional surveyor and mapper business as required by Chapter 472, Florida Statutes, has been received and processed.

The license appears below and is valid through February 28, 2023.

You are required to keep your information with the Board current. Please visit our website at www.800helpfla.com/psm to create your online account. If you have already created your online account, you can use the website to maintain your license. You can also find other valuable information on the website.

If you have any questions, please do not hesitate to call the Division of Consumer Services, Board of Professional Surveyors and Mappers at 800-435-7352 or 850-488-2221.

Detach Here

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.: **LB8031**
Expiration Date February 28, 2023

Professional Surveyor and Mapper Business License
Under the provisions of Chapter 472, Florida Statutes

JBROWN PROFESSIONAL GROUP INC.
3530 NW 43RD ST
GAINESVILLE, FL 32606-6104

nicole fried

NICOLE "NIKKI" FRIED
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.

JBPro

04

Project Experience

31
Professional Employees

501
Clients Satisfied

2,029
Contracts Completed

26
Years of Experience

CDD & Public Project Experience

Experience with Continuing Services Contracts

All current and previous JBPro continuing services contract agencies are provided in the list below.

Clay County School District
Alachua County School Board *
University of Florida
Santa Fe Community College *
City of Alachua
City of Gainesville
Gainesville Regional Utilities (GRU)
City of Gainesville CRA
City of Gainesville Wild Spaces and Public Places
Alachua County
Levy County
State of Florida Dept. of Military Affairs
Jacksonville Electric Authority (JEA)

* as sub-consultant

CDD Experience

In addition to our general experience with public continuing services clients, JBPro has also worked specifically with Community Development Districts and other special purpose districts. Notably, we have worked with the following districts:

The Villages CDDs (17 total districts)
Seminole Improvement District
Tara Forest CDD
Tara Oaks CDD

Having served as the District Engineer for the most significant network of CDDs in the state of Florida, JBPro staff is uniquely prepared to handle the needs of the Creekview Community Development District. Director of Engineering, Chris Potts, PE, and JBPro have collectively completed projects for exactly twenty (20) community development or special purpose government districts, which have included design projects for public infrastructure, commercial centers, and, of course, numerous 1,000+ home single- and multi-family developments.

Besides work on CDDs, JBPro has worked on several notably public and private projects, including planned developments, roadway projects, and high-profile recreation projects. Please see our detailed project portfolio, on the following pages.

The Villages CDDs

Project Information

Project Location:
The Villages, FL

Design Completion Date:
Ongoing

Construction Completion Date:
Ongoing

Construction Cost:
>$1,000,000,000

Overview

Description: JBPro staff served as District Engineer for all 17 of the special purpose districts in The Villages, which covers 32 square miles, approximately 17,000 acres, and over 55,000 residential units. The districts construct and maintain a number of types of public infrastructure including water, sewer, drainage, irrigation, water management, parks, recreation facilities, golf courses, and roadways. The districts also own and operate more than 100 recreation centers within The Villages. As District Engineer, the duties included design and permitting of utility, roadway, recreation, and stormwater management infrastructure improvements. The total improvements of the development were estimated to be more than a billion dollars.

Relevance: With this experience, working on the largest collection of special purpose distracts in the state of Florida, JBPro staff is well-equipped to manage any CDD as a district engineer. The experience on this project, whether it be public infrastructure, commercial, or residential design, has directly prepared JBPro to serve as the District Engineer for the Creekview Community Development Distract. JBPro can complete any part of the Creekview CDD scope with design and project management excellence. Our staff has the experience to prove it.

Project Owner's Information

Owner: The Villages
Address: 984 Old Mill Run
The Villages, FL 32162

Contact: Richard Baier, District Manger
Phone: (352) 751-3939
Email: richard.baier@districtgov.org

Tara Forest CDD

Project Information

Project Location:
Tara Forest CDD (Alachua, FL)

Design Completion Date:
Ongoing

Construction Completion Date:
Ongoing

Construction Cost:
>$48,000,000

Overview

Description: JBPro is the design engineer of the Tara Forest developments which include Tara Forest East, Tara Baywood, Tara Forest West, and Tara Phoenicia, totaling approximately 380 acres. The Tara Forest CDD will be comprised of 1,200 residential lots and over 44 acres of a mixed-used development with roadway, stormwater management, and utility infrastructure improvements. JBPro coordinated with the owner on preparing the estimated development cost for the engineer's report and the supporting documents for the petition to create the CDD with the City of Alachua. The total estimated construction cost of the infrastructure improvements is over $48 million dollars. JBPro is currently permitting the first phases of the CDD with the City of Alachua and obtaining all necessary site permits for construction of the site infrastructure improvement

Relevance: Another large-scale mixed-use development, the Tara Forest CDD project further demonstrates the capability of JBPro to design and permit the types of projects that the Creekview CDD would be completing. In addition, this project shows JBPro's experience in setting up CDDs and navigating the local political climate that affects them. JBPro is prepared to help the Creekview CDD as a consultant on the legalities of CDD communities and as a design partner for future projects.

Project Owner's Information

Owner: Tara Forest, LLC
Address: 7717 NW 20th Ln
Gainesville, FL 32605

Contact: Sayed Moukhtara
Phone: (352) 278-5317
Email: sayed@moukhtara.com

Seminole Improvement District

Project Information

Project Location
Seminole Improvement District (Westlake, FL)

Design Completion Date:
Ongoing

Construction Completion Date
Ongoing

Construction Cost
>$200,000,000

Overview

Description: Served as District Engineer for the Seminole Improvement District (SID), which is an independent special purpose government authorized by Chapter 189 of Florida Statutes that was formed in 1970. SID was formerly known as Seminole Water Control District and consists of approximately 4,000 acres of land. SID is empowered to construct and maintain a number of types of public works and utilities including water, sewer, drainage, irrigation, water management, parks, recreation facilities, roadways and/or related activities for the Minto West Development by Minto Communities and the City of Westlake. As District Engineer, the duties included plan review for SID and design and permitting of utility, roadway, stormwater management design and permitting. Several roadway projects were designed, permitted and constructed for the SID, master planning the utility system, development of a Water Control Plan, preparation of an engineer's report for bonding. SID was incorporated into a city, the City of Westlake. During the incorporation process, the District Engineer was tasked with developing the land development code for the city. The total improvements of the development were estimated over $200 million dollars.

Description: The experience of JBPro staff on this project will set us up perfectly for the demands of being the district engineer for the Creekview Community Development District. The range of projects, from stormwater improvements to parks and recreation projects, are likely very similar to the project requirements Creekview will have ,and the experience with the incorporation process has prepared JBPro staff to handle special assignments for a CDD that may be out of the scope of a normal engagement with a district engineer. JBPro is prepared for all facets of serving as the district engineer for the Creekview CDD.

Project Owner's Information

Owner: Seminole Improvement District
Address: 210 N University Dr
Coral Springs, FL 33071

Contact: Scott Massey, President
Phone: (561) 790-1742
Email: smassey@sidistrict.com

Town of Tioga

Project Information

Project Location
Tioga, FL

Design Completion Date:
Ongoing

Construction Completion Date
Ongoing

Construction Cost
>$66,000,000

Description

Overview: The Town of Tioga is a major planned development neighborhood and town center in Tioga, Florida. It currently consists of a seven-phase town center and a 21-phase single-family subdivision, but the development is continuing to grow in both its commercial and residential facets. JBPro has been the engineer or record for the entire development and has been an integral part of bringing the development to what it is today. JBPro is currently completing a boundary and topographic survey of 216.12 acres that will serve as a southeast expansion for the development, adding several more years of development opportunities for the owner.

Relevance: While not legally a CDD, the Town of Tioga planned development project requires many of the same skills and experiences that will enable JBPro to be very successful with the Creekview Community Development District. The long-term engagement on the project and the mixed-use nature of the development are both similar to the requirements of a CDD. JBPro would draw heavily on its experience with the Town of Tioga while serving the Creekview CCD.

Project Owner's Information

Owner: Town of Tioga, LLC
Address: 104 SW 131st Street
Tioga, FL 32669

Contact: Luis Diaz, Owner
Phone: (352) 331-6220
Email: diaz@townoftioga.com

Tara Oaks CDD

Project Information

Project Location:
Tara Oaks CDD (Leesburg, FL)

Design Completion Date:
Ongoing

Construction Completion Date:
Ongoing

Construction Cost:
~$36,000,000

Overview

Description: JBPro was requested by the owner to participate as a Board Member of the CDD. As a Board Member, JBPro participated in the initial board meetings and voting for the creation, budgets, bonding, and Engineer's Report. The development consists of 1,200 homesites near Leesburg, Florida. JBPro serves in a consulting role that is influential in the direction of the development district as far as master planning and site engineering.

Relevance: As a board member for the Tara Oaks CDD, JBPro is heavily involved in all aspects of the CDD, giving us valuable experience that is directly applicable to our anticipated scope of services for the Creekview Community Development District. The 1,200 home development is significant enough that our experience on this project can transfer to a CDD of any size and with a wide range of project requirements.

Project Owner's Information

Owner: Tara Oaks, LLC
Address: 7717 NW 20th Ln
Gainesville, FL 32605

Contact: Sayed Moukhtara
Phone: (352) 278-5317
Email: sayed@moukhtara.com

Depot Park

Project Information

Project Location:
Gainesville, FL

Design Completion Date:
October 2015

Construction Completion Date:
September 2016

Construction Cost:
$4,500,000

Overview

Description: Depot Park is the City of Gainesville's groundbreaking "Central Park" project to revitalize a 33-acre brownfield reclamation area, and turn it into the downtown's premier multi-use recreational park. The project required substantial environmental remediation efforts to create a project liner over previously contaminated soils that were remediated. The design of Depot Park included a regional stormwater park with promenade, a rails to trails multi-use paved path, a modern boundless playground with splash pad, a large picnic pavilion, a public restroom building, walking trails, landscaping, lighting, and a grassed viewing area with stage facilities. JBPro was the prime design consultant coordinating the design efforts of the sub-consultant team, and designing all of the site layout, hardscape, site grading and drainage, and utility infrastructure.

Relevance: JBPro successfully transformed this brownfield reclamation area into an iconic and highly-regarded recreational park for the City of Gainesville. JBPro gained tremendous experience in leadership and coordination, which would be the benefit of the Creekview CDD. JBPro is capable of providing any park or recreation design services to the Creekview CDD.

Project Owner's Information

Owner: City of Gainesville
Address: 2153 SE Hawthorne Rd., Suite 223
Gainesville, FL 32641

Contact: Sarah Vidal
Phone: (352) 393-8203
Email: vidalsc@cityofgainesville.org

City of Alachua Plan Review Services

Project Information

Project Location:
Various (Alachua, FL)

Design Completion Date:
N/A

Construction Completion Date:
N/A

Construction Cost:
N/A

Overview

Description: JBPro has provided the City of Alachua with third-party engineering review of site plan submittals since 2014. JBPro has completed 51 total reviews and 23 major site plan reviews in the last two years. The plans are reviewed to ensure the land development regulations of the City are met and the engineering or plat design complies with local and state standards. JBPro meets or exceeds the City's strict review time frame for each review.

Relevance: Plan review services are a critical part of the scope of services for the Creekview Community Development District. Similar to this continuing services engagement with the City of Alachua, engineering plan review services could be offered to the Creekview CDD by JBPro. To highlight our time-sensitive and budget-conscious approach on these specific types of projects, please see the additional sections below.

Project Scheduling Approach: Upon receipt of the site plan submittal, a JBPro Staff Engineer performs a review of the entire project within 3 working days. After the initial review, a meeting is held with a JBPro Project Manager to discuss comments. Any additional comments and design suggestions are compiled within the next 7 working days. A complete review is returned to the City within 10 working days.

QA/QC Approach: An initial review of the project is conducted by a JBPro Staff Engineer. If necessary, the Staff Engineer may reach out to the Design Engineer for the project to discuss the design intent in order to achieve a better overall understanding of the project. Once the Staff Engineer has finished their review, they discuss any suggested revisions or comments to be provided with a JBPro Project Manager. After the discussion and review with the Project Manager, the project is returned to the City of Alachua with all applicable comments and suggestions.

Project Owner's Information

Owner: City of Alachua
Address: 15100 NW 142nd Ter
Alachua, FL 32615

Contact: Katherine Winburn
Phone: (386) 418-6100
Email: kwinburn@cityofalachua.org

UF-642 - SW Campus Transportation Improvements

Project Information

Project Location:
Gainesville, FL

Design Completion Date:
December 2019

Construction Completion Date:
2022 (proj.)

Construction Cost:
$12,000,000

Overview

Description: Design of a new roundabout to better distribute traffic flow at the busy intersection of Radio Rd. & Museum Drive on the UF main campus. The project involved extensive utility coordination due to multiple historical utility lines of all types that crossed the project limits. A large double barrel box culvert was designed to provide a major new stormwater discharge for Lake Alice to bypass Museum Rd. in major storm events without overtopping. SJRWMD ERP Permitting provided.

Relevance: This project was a major roadway improvement that was utilized to install a roundabout in lieu of a traffic signal or other major turn lane improvements. It will move vehicles from all four directions very efficiently. Additionally, it included the design of a major box culvert drainage structure. These type of facilities and improvements could definitely be required in various locations within the Creekview CDD. JBPro is more than capable is providing any transportation or streetscape design services to the CCD, whether for functional traffic flow improvements or for beautification projects.

Project Owner's Information

Owner: University of Florida
Address: 405 NW 39th Ave
Gainesville, FL

Contact: Stuart Cullen, PE
Phone: (352) 273-4030
Email: stuartcullen@ufl.edu

St. Anne's Early Learning Center

Project Information

Project Location:
Gainesville, FL

Design Completion Date:
April 2019

Construction Completion Date:
June 2020

Construction Cost:
$6,500,000

Overview

Description: The Diocese of St Augustine hired JBPro to split off a 5.0-acre commercial property from the Holy Faith church campus to create a new preschool educational facility adjacent to W. Newberry Rd. (SR 26). The project originally named the Gainesville Early Learning Center was renamed St. Anne Early Learning Center. The learning center building was 19,000 SF and was the primary development in a planned commercial center that will accommodate an additional 10,000 SF building. The school was designed to accommodate 260 students. The site was master planned by JBPro including wetland impacts, master stormwater management and utility infrastructure, shared parking, and State Rd. 26 turn lane roadway improvements.

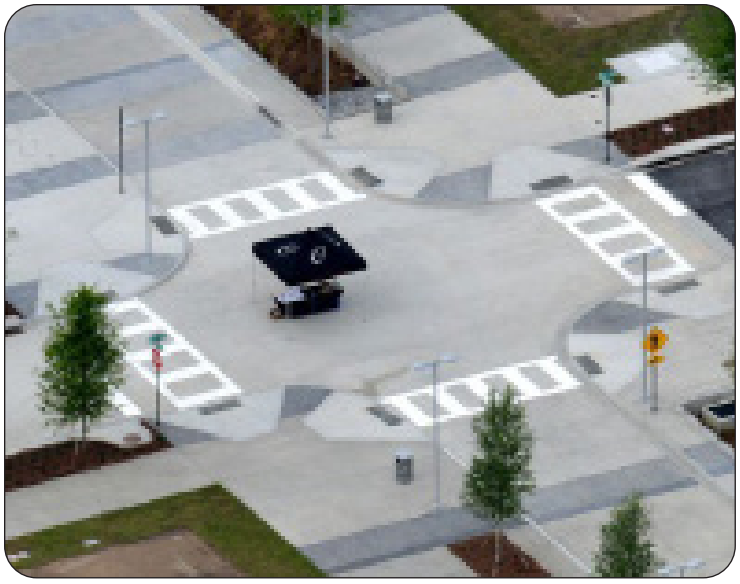
Relevance: This project was a new educational facility for up to 260 infants and preschool students. The site was designed with outdoor play areas, screening and fencing safety measures, a vehicular drop-off, and stormwater, utility, paving, and grading improvements typical of most school sites. It could be very similar to a daycare project required in a significant CDD like Creekview that has many residents that will require child services.

Project Owner's Information

Owner: Diocese of St. Augustine
Address: 4300 Newberry Rd.
Gainesville, FL 32641

Contact: Lester Del Rosario
Phone: (904) 262-3200
Email: wldelrosario@dosafl.com

SW 9th Street



Project Information

Project Location:
Gainesville, FL

Design Completion Date:
July 2013

Construction Completion Date:
June 2014

Construction Cost:
$2,400,000

Description

Overview: This project, performed for the City of Gainesville Community Redevelopment Agency, was a key part of the redevelopment of the former Alachua General Hospital (AGH) site and surrounding properties into the Innovation Hub and Innovation Square, which is a 12-block urban mixed-use research district that integrates new development into the existing urban fabric.

SW 9th Street was envisioned as a "green" road, using the latest in urban design concepts to provide a pedestrian-friendly space acting as a north-south spine in Innovation Square. Both the roadway and pedestrian facilities were designed with multi-colored concrete, and cascading bio-retention stormwater cells were designed along the west side of the road to provide stormwater treatment utilizing the latest in low-impact development concepts.

A new pocket park was also incorporated into the design, which includes a large bio-retention facility with multiple retention cells cascading into one another. The project included roadway design, drainage design, utility accommodation, electrical and lighting design, and significant landscape and hardscape design.

Relevance: Every public entity needs a design consultant that can handle roadway projects like the SW 9th Street project in Gainesville. Being an APWA National Roadway Project of the Year (Less than $5M), this project demonstrates JBPro's capability and standard of excellence that it would provide the Creekview CDD on roadway projects like this one.

Project Owner's Information

Owner: City of Gainesville
Address: 2153 SE Hawthorne Rd., Suite 223
Gainesville, FL 32641

Contact: Sarah Vidal
Phone: (352) 393-8203
Email: vidalsc@cityofgainesville.org

JBPro

05

Budget & Timeline

31
Professional Employees

501
Clients Satisfied

2,029
Contracts Completed

26
Years of Experience

Project Prioritization

Continuing Services Perspective

JBPro places top priority on all of our continuing services contract or district engineering work. We do not try to serve too many organizations, and, as a result, we provide a very high level of attention to our continuing contract clients. We value these clients at the very top of our project workload and this is the key to our success with this type of work. By making these project assignments a top priority, we are able to pay particular attention to the timelines and budgets for these projects. We establish internal protocols to make sure every project team member is extremely informed and keenly aware of our client's goals and objectives for their projects. A typical project team organization is provided below.

Civil Engineering Team

Principal in Charge: President or Director of Engineering (Prepares proposal, primary communication & QA/QC)

Project Manager: PE or Engineer with minimum 5 years of experience (Primary for design and permitting, primary communication)

Staff Engineer 1: Staff Engineer (Drawing production, permitting coordination, secondary communication)

Staff Engineer 2: Staff Engineer (Drawing production, permitting coordination, secondary communication)
Note - Need for staff engineer 2 is dependent on size of project.

Planner/Coordinator: Urban Planner (Regulatory code compliance, permitting submittals and applications, address zoning and comprehensive plan and other planning issues)

Surveying Team

Principal in Charge: Director of Surveying (Prepares proposal, primary communication, & QA/QC)

Project Manager: Surveyor with minimum 3 years of experience (Primary responsibility for organizing field work, production drawing, primary communication)

Field Technician(s): 1-person or 2-person crew (Provide all field measurements and survey work effort)

Design Technician: Survey specific AutoCAD technician (drawing production)

Project Approach

Ten Keys to Maintaining Schedule & Budget

01 We respond immediately to project task assignment requests. Initial client contact is desired within an hour of a first request, but always within 24 hours or less.

02 We listen carefully to the details of our client's project and make sure we fully understand the project objectives and goals, especially as it relates to required schedule and budget.

03 We research the project fully and excessively, as necessary, to completely understand the project needs and to best understand the design and permitting objectives.

04 Based on our client's needs and our project research, we prepare a proposal that includes a detailed scope of services and fee proposal. This is provided to our client no more than one week after first contact. We work with our client during the proposal process to make sure they are satisfied with the proposed work scope and fees, and are always willing to make adjustments to meet the needs of our client.

05 The best JBPro design team will be assigned to the project based on the specific project needs. This will include a designated Project Manager and other engineering design team members as needed to meet the project design and scheduling demands. The Principal Engineer and/or the Engineering Director will always be involved in any engineering project assignment and will provide complete project oversight throughout the project.

06 The design team never changes on a project, staying consistent throughout the project lifecycle. Every team member is fully aware of the design and permitting status and virtually all communication. This is critical and assures that all JBPro team members are available to answer any client question or address any requests. All members of the project team are experienced professionals.

Project Approach

Ten Keys to Maintaining Schedule & Budget

07 JBPro utilizes a Project Management Platform (Wrike) to assign and organize all tasks required for each project. It is managed daily by the project manager to enable a complete record of project tasks assigned, due dates, and completion dates. This ensures all team members are aware of their personal assignments and expectations for the project throughout the life of the project.

08 Complete detailed schedules are developed for each project. The schedules are developed within Wrike to make sure all tasks are assigned and scheduled to address the overall project schedule. When project issues arise, adjustments are made within the overall project schedule to keep the project on a path toward an on-time completion.

09 Weekly status reports and regularly scheduled meetings with the client's project manager are imperative to a smooth project outcome. These consistent, organized, and scheduled contacts are a vital part of a typical JBPro project. Constant communication via emails, phone calls, in-person meetings, and virtual meetings keeps the entire project team up to date on all aspects and decisions affecting the project. Project Schedules and Budgets are monitored in these meetings to stay focused on these critical project objectives throughout the entire project timeframe.

10 Our most experienced engineers provide QA/QC oversight for all of our projects as a foundation of our QA/QC plan for each project. The oversight consists of a detailed review provided by our Principal Engineer or Engineering Director, who together have over 45 years of engineering design experience. We pride ourselves in preparing the highest quality construction documents, believing it to be the foundation of JBPro's success and our distinct calling card. One of the ways this is achieved is by employing excellent engineering team members who truly care about doing great work for our clients. Additionally, the QA /QC oversight provided on all submittal documents by our most experienced professional staff is a routine part of our work flow. We believe this approach has helped us achieve a reputation of preparing excellent work within our industry.

By implementing the above ten items on a regular recurring basis, we are fortunate to achieve very successful project outcomes, including strict conformance to budget and schedule. These key project components are possible by having a great staff, communicating well with each other and our clients, and providing excellent design and permitting work. We truly believe we excel in these areas, and it has been a key to our success and growth over the last 26 years.

JBPro

06

Standard Form 330

31
Professional Employees

501
Clients Satisfied

2,029
Contracts Completed

26
Years of Experience

ARCHITECT-ENGINEER QUALIFICATIONS

PART I - CONTRACT-SPECIFIC QUALIFICATIONS

A. CONTRACT INFORMATION

1. TITLE AND LOCATION *(City and State)*
Request for Qualifications for Engineering Services for the Creekview Community Development District (Clay County, FL)

2. PUBLIC NOTICE DATE	3. SOLICITATION OR PROJECT NUMBER
09/03/2021	N/A

B. ARCHITECT-ENGINEER POINT OF CONTACT

4. NAME AND TITLE
Christopher Potts, PE, Director of Civil Engineering

5. NAME OF FIRM
JBrown Professional Group Inc. (JBPro)

6. TELEPHONE NUMBER	7. FAX NUMBER	8. E-MAIL ADDRESS
(904) 789-8999	(352) 375-0833	chris.potts@jbpro.com

C. PROPOSED TEAM

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

	(Check) PRIME	J-V PARTNER	SUBCON-TRACTOR	9. FIRM NAME	10. ADDRESS	11. ROLE IN THIS CONTRACT
a.	✓			JBPro ☑ CHECK IF BRANCH OFFICE	4420 US-1 S, Suite 1 St. Augustine, FL 32086	Civil Engineering & Surveying Firm
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 ☑ *(Attached)*

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
Christopher Potts, PE	Director of Civil Engineering	14	2

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

JBrown Professional Group (JBPro) / Gainesville, FL

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*
B.S. Civil Engineering - University of Florida (2007)	Professional Engineer - Florida PE73842

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

LEED Green Associate
American Society of Civil Engineers

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
The Villages CDDs / The Villages, FL	Ongoing	Ongoing

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

☐ Check if project performed with current firm

Scope: Served as District Engineer for all 17 of the special purpose districts in The Villages, which covers 32 square miles, approximately 17,000 acres, and over 55,000 residential units. The districts construct and maintain a number of types of public infrastructure including water, sewer, drainage, irrigation, parks, and recreation facilities. **Construction Cost**: >$1,000,000,000 **Role**: District Engineer

b.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Tara Forest CDD / Alachua, FL	Ongoing	Ongoing

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

☑ Check if project performed with current firm

Scope: Designed 1,200 residential lots and over 44 acres of a mixed-used development with roadway, stormwater management, and utility infrastructure improvements. Coordinated with the owner on preparing the estimated development cost for the engineer's report and the supporting documents for the petition to create the CDD with the City of Alachua. **Construction Cost**: >$48,000,000 **Role**: District Engineer

c.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Seminole Improvement District / Westlake, FL	Ongoing	Ongoing

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

☐ Check if project performed with current firm

Scope: Served as District Engineer for the Seminole Improvement District (SID). Oversaw construction and maintenance of a number of types of public works and utilities including water, sewer, drainage, irrigation, water management, parks, recreation facilities, and roadways. **Construction Cost**: >$200,000,000 **Role**: District Engineer

d.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Town of Tioga / Tioga, FL	Ongoing	Ongoing

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

☑ Check if project performed with current firm

Scope: Serves as the project manager for a major planned development neighborhood and town center that currently consists of a seven-phase town center and a 21-phase single-family subdivision. Currently, JBPro is master planning a 216.12 acre southeastern expansion of the planned development. **Construction Cost**: >$66,000,000 **Role**: Project Manager

e.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Tara Oaks CDD / Leesburg, FL	Ongoing	Ongoing

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

☑ Check if project performed with current firm

Scope: As a Board Member, JBPro participated in the initial board meetings and voting for the creation, budgets, bonding, and Engineer's Report. The development consists of 1,200 homesites near Leesburg, Florida. **Construction Cost**: >$36,000,000 **Role**: District Board Member

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
Anthony J. "Jay" Brown Jr., PE	Principal Engineer	35	26

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

JBrown Professional Group (JBPro) / Gainesville & St. Augustine, FL

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*
B.S. Civil Engineering - University of Florida (1986) Post-Baccalaureate Studies in Civil Engineering - University of Florida (1987)	Professional Engineer - Florida 43879

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

American Society of Civil Engineers
Builder's Association of North Central Florida, Board of Directors

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Tara Forest CDD / Alachua, FL	Ongoing	Ongoing

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

☑ Check if project performed with current firm

Scope: Designed 1,200 residential lots and over 44 acres of a mixed-used development with roadway, stormwater management, and utility infrastructure improvements. Coordinated with the owner on preparing the estimated development cost for the engineer's report and the supporting documents for the petition to create the CDD with the City of Alachua. **Construction Cost**: >$48,000,000 **Role**: Principal District Engineer

b.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Town of Tioga / Tioga, FL	Ongoing	Ongoing

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

☑ Check if project performed with current firm

Scope: Serves as the project manager for a major planned development neighborhood and town center that currently consists of a seven-phase town center and a 21-phase single-family subdivision. Currently, JBPro is master planning a 216.12 acre southeastern expansion of the planned development. **Construction Cost**: >$66,000,000 **Role**: Principal Engineer

c.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Depot Park / Gainesville, FL	2015	2016

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

☑ Check if project performed with current firm

Scope: This project required significant environmental remediation efforts to turn a 33-acre brownfield reclamation area into downtown Gainesville's premier multi-use recreational park. The design included a stormwater park with promenade, paved paths, pavilions, playgrounds, a splash pad, and stage facilities. **Construction Cost:** $4,500,000 **Role:** Principal Engineer

d.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
City of Alachua Plan Review Services / Alachua, FL	Ongoing	Ongoing

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

☑ Check if project performed with current firm

Scope: JBPro has provided the City of Alachua with third-party engineering review of site plan submittals since 2014. JBPro has completed 51 total reviews and 23 major site plan reviews in the last two years. The plans are reviewed to ensure the land development regulations of the City are met and the engineering or plat design complies with local and state standards. **Construction Cost:** N/A **Role:** Principal Engineer

e.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
SW 9th Street / Gainesville, FL	2014	2014

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

☑ Check if project performed with current firm

Scope: This project was designed as a "green" road, using the latest in urban design concepts to provide a pedestrian-friendly space. A new pocket park was incorporated into the design, which includes a large bio-retention facility with multiple retention cells cascading into one another.
Construction Cost: $2,400,000 **Role:** Principal Engineer

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
Logan Peters, PE	Project Manager	9	8

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

JBrown Professional Group (JBPro) / Gainesville, FL

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*
B.S. Civil Engineering - University of Florida (2012)	Professional Engineer - Florida PE88516

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

Florida Engineering Society
National Home Builder's Association
National Society of Professional Engineers
Builder's Association of North Central Florida

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Tara Forest CDD / Alachua, FL	Ongoing	Ongoing

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

☑ Check if project performed with current firm

Scope: Designed 1,200 residential lots and over 44 acres of a mixed-used development with roadway, stormwater management, and utility infrastructure improvements. Coordinated with the owner on preparing the estimated development cost for the engineer's report and the supporting documents for the petition to create the CDD with the City of Alachua. **Construction Cost:** >$48,000,000 **Role:** Project Manager

b.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Depot Park / Gainesville, FL	2015	2016

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

☑ Check if project performed with current firm

Scope: This project required significant environmental remediation efforts to turn a 33-acre brownfield reclamation area into downtown Gainesville's premier multi-use recreational park. The design included a stormwater park with promenade, paved paths, pavilions, playgrounds, a splash pad, and stage facilities. **Construction Cost:** $4,500,000 **Role:** Design Engineer

c.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
UF-642 SW Campus Transportation Improvements / University of Florida, Gainesville, FL	2019	2022 (proj.)

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

☑ Check if project performed with current firm

Scope: This project involves a full redesign of several major transportation corridors, the undergrounding of extensive overhead electric distribution networks, and the design and installation of two new roundabouts at congested intersections on the UF campus. **Construction Cost:** $12,000,000 **Role:** Co-Project Manager

d.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
St. Anne Early Learning Center / Gainesville, FL	2019	2020

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

☑ Check if project performed with current firm

Scope: The learning center building was 19,000 SF and was the primary development in a planned commercial center that will accommodate an additional 10,000 SF building. The school was designed to accommodate 260 students. The site was master planned by JBPro including wetland impacts, master stormwater management and utility infrastructure, and shared parking. **Construction Cost:** $6,500,000 **Role:** Project Manager

e.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
SW 9th Street - Innovation District Roadway, Gainesville, FL	2014	2014

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

☑ Check if project performed with current firm

Scope: This project was designed as a "green" road, using the latest in urban design concepts to provide a pedestrian-friendly space. A new pocket park was incorporated into the design, which includes a large bio-retention facility with multiple retention cells cascading into one another.
Construction Cost: $2,400,000 **Role:** Design Engineer

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
Troy Wright, PSM	Principal Surveyor	10	4

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

JBrown Professional Group (JBPro) / Gainesville & St. Augustine, FL

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*
B.S. Geomatics Engineering - Florida Atlantic University (2011)	Professional Surveyor & Mapper - Florida LS7210

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

Certificate of Completion, Underground Utility Designation - Staking University (2014)
MOT Certified - FDOT (2015)

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Tara Forest CDD / Alachua, FL	Ongoing	Ongoing

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

☑ Check if project performed with current firm

Scope: Surveyed 1,200 residential lots and over 44 acres of a mixed-used development with roadway, stormwater management, and utility infrastructure improvements. Coordinated with the owner on preparing the boundary survey, plat, and the supporting documents for the petition to create the CDD with the City of Alachua. **Construction Cost:** >$48,000,000 **Role:** Principal Surveyor

b.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Town of Tioga / Tioga, FL	Ongoing	Ongoing

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

☑ Check if project performed with current firm

Scope: Serves as the Principal Surveyor for a major planned development neighborhood and town center that currently consists of a seven-phase town center and a 21-phase single-family subdivision. Currently, JBPro is surveying a 216.12 acre southeastern expansion of the planned development. **Construction Cost:** >$66,000,000 **Role:** Principal Surveyor

c.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
City of Alachua Plan Review Services / Alachua, FL	Ongoing	Ongoing

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

☑ Check if project performed with current firm

Scope: JBPro has provided the City of Alachua with third-party surveying review of plat submittals since 2014. JBPro has completed 51 total reviews and 23 major plan reviews in the last two years. The plans are reviewed to ensure the land development regulations of the City are met and the surveying or plat design complies with local and state standards. **Construction Cost:** N/A **Role:** Principal Surveyor

d.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
UF-642 SW Campus Transportation Improvements / University of Florida, Gainesville, FL	2019	2022 (proj.)

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

☑ Check if project performed with current firm

Scope: This project involves a full redesign of several major transportation corridors, the undergrounding of extensive overhead electric distribution networks, and the design and installation of two new roundabouts at congested intersections on the UF campus. **Construction Cost:** $12,000,000 **Role:** Principal Surveyor

e.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
St. Anne Early Learning Center / Gainesville, FL	2019	2020

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

☑ Check if project performed with current firm

Scope: The learning center building was 19,000 SF and was the primary development in a planned commercial center that will accommodate an additional 10,000 SF building. The school was designed to accommodate 260 students. The site was surveyed by JBPro to prepare for wetland impacts, master stormwater management, utility infrastructure, and shared parking. **Construction Cost:** $6,500,000 **Role:** Principal Surveyor

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 01

21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
The Villages Community Development Districts, The Villages, Florida	Ongoing	Ongoing

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
The Villages	Richard Baier	352-751-3939

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

Description: JBPro staff served as District Engineer for all 17 of the special purpose districts in The Villages, which covers 32 square miles, approximately 17,000 acres, and over 55,000 residential units. The districts construct and maintain a number of types of public infrastructure including water, sewer, drainage, irrigation, water management, parks, recreation facilities, golf courses, and roadways. The districts also own and operate more than 100 recreation centers within The Villages. As District Engineer, the duties included design and permitting of utility, roadway, recreation, and stormwater management infrastructure improvements. The total improvements of the development were estimated to be more than a billion dollars.

Relevance: With this experience, working on the largest collection of special purpose distracts in the state of Florida, JBPro staff is well-equipped to manage any CDD as a district engineer. The experience on this project, whether it be public infrastructure, commercial, or residential design, has directly prepared JBPro to serve as the District Engineer for the Creekview Community Development Distract. JBPro can complete any part of the Creekview CDD scope with design and project management excellence. Our staff has the experience to prove it.

Construction Cost: >$1,000,000,000

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	Christopher Potts, PE (Farner, Barley)	Wildwood, Florida	District Engineer
b.	N/A	N/A	N/A
c.	N/A	N/A	N/A
d.	N/A	N/A	N/A
e.	N/A	N/A	N/A
f.	N/A	N/A	N/A

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 02

21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Tara Forest CDD, City of Alachua, Florida	Ongoing	Ongoing

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Sayed Moukhtara	Sayed Moukhtara	352-278-5317

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

Description: JBPro is the design engineer of the Tara Forest developments which include Tara Forest East, Tara Baywood, Tara Forest West, and Tara Phoenicia, totaling approximately 380 acres. The Tara Forest CDD will be comprised of 1,200 residential lots and over 44 acres of a mixed-used development with roadway, stormwater management, and utility infrastructure improvements. JBPro coordinated with the owner on preparing the estimated development cost for the engineer's report and the supporting documents for the petition to create the CDD with the City of Alachua. The total estimated construction cost of the infrastructure improvements is over $48 million dollars. JBPro is currently permitting the first phases of the CDD with the City of Alachua and obtaining all necessary site permits for construction of the site infrastructure improvement.

Relevance: Another large-scale mixed-use development, the Tara Forest CDD project further demonstrates the capability of JBPro to design and permit the types of projects that the Creekview CDD would be completing. In addition, this project shows JBPro's experience in setting up CDDs and navigating the local political climate that affects them. JBPro is prepared to help the Creekview CDD as a consultant on the legalities of CDD communities and as a design partner for future projects.

Construction Cost: >$48,000,000

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	JBPro	Gainesville, Florida	Engineer of Record for development
b.	N/A	N/A	N/A
c.	N/A	N/A	N/A
d.	N/A	N/A	N/A
e.	N/A	N/A	N/A
f.	N/A	N/A	N/A

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 03

21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Seminole Improvement District, City of Westlake, Florida	Ongoing	Ongoing

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Seminole Improvement District	Scott Massey, President	561-790-1742

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

Description: Served as District Engineer for the Seminole Improvement District (SID), which is an independent special purpose government authorized by Chapter 189 of Florida Statutes that was formed in 1970. SID was formerly known as Seminole Water Control District and consists of approximately 4,000 acres of land. SID is empowered to construct and maintain a number of types of public works and utilities including water, sewer, drainage, irrigation, water management, parks, recreation facilities, roadways and/or related activities for the Minto West Development by Minto Communities and the City of Westlake. As District Engineer, the duties included plan review for SID and design and permitting of utility, roadway, stormwater management design and permitting. Several roadway projects were designed, permitted and constructed for the SID, master planning the utility system, development of a Water Control Plan, preparation of an engineer's report for bonding. SID was incorporated into a city, the City of Westlake. During the incorporation process, the District Engineer was tasked with developing the land development code for the city. The total improvements of the development were estimated over $200 million dollars.

Relevance: The experience of JBPro staff on this project will set us up perfectly for the demands of being the district engineer for the Creekview Community Development District. The range of projects, from stormwater improvements to parks and recreation projects, are likely very similar to the project requirements Creekview will have ,and the experience with the incorporation process has prepared JBPro staff to handle special assignments for a CDD that may be out of the scope of a normal engagement with a district engineer. JBPro is prepared for all facets of serving as the district engineer for the Creekview CDD.

Construction Cost: >$200,000,000

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	Christopher Potts, PE (Farner, Barley)	Wildwood, Florida	District Engineer
b.	N/A	N/A	N/A
c.	N/A	N/A	N/A
d.	N/A	N/A	N/A
e.	N/A	N/A	N/A
f.	N/A	N/A	N/A

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: 04

21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Town of Tioga (Newberry, FL)	Ongoing (Phase 1 - 2004)	Ongoing

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Dibros Design & Construction	Luis Diaz	(352) 331-6220

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

Description: The Town of Tioga is a major planned development neighborhood and town center in Tioga, Florida. It currently consists of a seven-phase town center and a 21-phase single-family subdivision, but the development is continuing to grow in both its commercial and residential facets. JBPro has been the engineer or record for the entire development and has been an integral part of bringing the development to what it is today. JBPro is currently completing a boundary and topographic survey of 216.12 acres that will serve as a southeast expansion for the development, adding several more years of development opportunities for the owner.

Relevance: While not legally a CDD, the Town of Tioga planned development project requires many of the same skills and experiences that will enable JBPro to be very successful with the Creekview Community Development District. The long-term engagement on the project and the mixed-use nature of the development are both similar to the requirements of a CDD. JBPro would draw heavily on its experience with the Town of Tioga while serving the Creekview CCD.

Construction Cost: >$66,000,000

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	JBPro	Gainesville, FL	Principal Civil Engineering & Surveying Firm
b.	N/A	N/A	N/A
c.	N/A	N/A	N/A
d.	N/A	N/A	N/A
e.	N/A	N/A	N/A
f.	N/A	N/A	N/A

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: 05

21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Tara Oaks CDD, City of Leesburg, Florida	Ongoing	Ongoing

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Sayed Moukhtara	Sayed Moukhtara	352-278-5317

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

Description: JBPro was requested by the owner to participate as a Board Member of the CDD. As a Board Member, JBPro participated in the initial board meetings and voting for the creation, budgets, bonding, and Engineer's Report. The development consists of 1,200 homesites near Leesburg, Florida. JBPro serves in a consulting role that is influential in the direction of the development district as far as master planning and site engineering.

Relevance: As a board member for the Tara Oaks CDD, JBPro is heavily involved in all aspects of the CDD, giving us valuable experience that is directly applicable to our anticipated scope of services for the Creekview Community Development District. The 1,200 home development is significant enough that our experience on this project can transfer to a CDD of any size and with a wide range of project requirements.

Construction Cost: ~$36,000,000

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	JBPro	Gainesville, Florida	Board Member
b.	N/A	N/A	N/A
c.	N/A	N/A	N/A
d.	N/A	N/A	N/A
e.	N/A	N/A	N/A
f.	N/A	N/A	N/A

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 06

21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Depot Park / Gainesville, FL	2015	2016

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
City of Gainesville	Sarah Vidal	352-393-8203

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

Description: Depot Park is the City of Gainesville's groundbreaking "Central Park" project to revitalize a 33-acre brownfield reclamation area, and turn it into the downtown's premier multi-use recreational park. The project required substantial environmental remediation efforts to create a project liner over previously contaminated soils that were remediated. The design of Depot Park included a regional stormwater park with promenade, a rails to trails multi-use paved path, a modern boundless playground with splash pad, a large picnic pavilion, a public restroom building, walking trails, landscaping, lighting, and a grassed viewing area with stage facilities. JBPro was the prime design consultant coordinating the design efforts of the sub-consultant team, and designing all of the site layout, hardscape, site grading and drainage, and utility infrastructure.

Relevance: JBPro successfully transformed this brownfield reclamation area into an iconic and highly-regarded recreational park for the City of Gainesville. JBPro gained tremendous experience in leadership and coordination, which would be the benefit of the Creekview CDD. JBPro is capable of providing any park or recreation design services to the Creekview CDD.

Construction Cost: $4,500,000

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	JBPro	Gainesville, Florida	Principal Civil Engineering Firm
b.	N/A	N/A	N/A
c.	N/A	N/A	N/A
d.	N/A	N/A	N/A
e.	N/A	N/A	N/A
f.	N/A	N/A	N/A

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 07

21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
City of Alachua Continuing Services (Alachua, FL)	Ongoing	N/A

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
City of Alachua	Katherine Winburn	(386) 418-6100

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

Description: JBPro has provided the City of Alachua with third-party engineering review of site plan submittals since 2014. JBPro has completed 51 total reviews and 23 major site plan reviews in the last two years. The plans are reviewed to ensure the land development regulations of the City are met and the engineering or plat design complies with local and state standards. JBPro meets or exceeds the City's strict review time frame for each review.

Relevance: Plan review services are a critical part of the scope of services for the Creekview Community Development District. Similar to this continuing services engagement with the City of Alachua, engineering plan review services could be offered to the Creekview CDD by JBPro. To highlight our time-sensitive and budget-conscious approach on these specific types of projects, please see the additional sections below.

Project Scheduling Approach: Upon receipt of the site plan submittal, a JBPro Staff Engineer performs a review of the entire project within 3 working days. After the initial review, a meeting is held with a JBPro Project Manager to discuss comments. Any additional comments and design suggestions are compiled within the next 7 working days. A complete review is returned to the City within 10 working days.

QA/QC Approach: An initial review of the project is conducted by a JBPro Staff Engineer. If necessary, the Staff Engineer may reach out to the Design Engineer for the project to discuss the design intent in order to achieve a better overall understanding of the project. Once the Staff Engineer has finished their review, they discuss any suggested revisions or comments to be provided with a JBPro Project Manager. After the discussion and review with the Project Manager, the project is returned to the City of Alachua with all applicable comments and suggestions.

Construction Cost: N/A

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	JBrown Professional Group Inc.	Gainesville, FL	Engineering &Surveying Review
b.	N/A	N/A	N/A
c.	N/A	N/A	N/A
d.	N/A	N/A	N/A
e.	N/A	N/A	N/A
f.	N/A	N/A	N/A

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 08

21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
UF-642 SW Campus Transportation Improvements (Gainesville, FL)	2019	2022 (proj.)

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Univeristy of Florida	Stuart Cullen, PE	(352) 273-4030

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

Description: Design of a new roundabout to better distribute traffic flow at the busy intersection of Radio Rd. & Museum Drive on the UF main campus. The project involved extensive utility coordination due to multiple historical utility lines of all types that crossed the project limits. A large double barrel box culvert was designed to provide a major new stormwater discharge for Lake Alice to bypass Museum Rd. in major storm events without overtopping. SJRWMD ERP Permitting provided.

Relevance: This project was a major roadway improvement that was utilized to install a roundabout in lieu of a traffic signal or other major turn lane improvements. It will move vehicles from all four directions very efficiently. Additionally, it included the design of a major box culvert drainage structure. These type of facilities and improvements could definitely be required in various locations within the Creekview CDD. JBPro is more than capable os providing any transportation or streetscape design services to the CCD, whether for functional traffic flow improvements or for beautification projects.

Construction Cost: >$12,000,000,000

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	JBrown Professional Group Inc.	Gainesville, FL	Principal Civil Engineer & Surveying Firm
b.	N/A	N/A	N/A
c.	N/A	N/A	N/A
d.	N/A	N/A	N/A
e.	N/A	N/A	N/A
f.	N/A	N/A	N/A

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: 09

21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
St. Anne Early Learning Center (Gainesville, FL)	2019	2020

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Diocese of St. Augustine	Lester Del Rosario	(904) 262-3200

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

Description: The Diocese of St Augustine hired JBPro to split off a 5.0-acre commercial property from the Holy Faith church campus to create a new preschool educational facility adjacent to W. Newberry Rd. (SR 26). The project originally named the Gainesville Early Learning Center was renamed St. Anne Early Learning Center. The learning center building was 19,000 SF and was the primary development in a planned commercial center that will accommodate an additional 10,000 SF building. The school was designed to accommodate 260 students. The site was master planned by JBPro including wetland impacts, master stormwater management and utility infrastructure, shared parking, and State Rd. 26 turn lane roadway improvements.

Relevance: This project was a new educational facility for up to 260 infants and preschool students. The site was designed with outdoor play areas, screening and fencing safety measures, a vehicular drop-off, and stormwater, utility, paving, and grading improvements typical of most school sites. It could be very similar to a daycare project required in a significant CDD like Creekview that has many residents that will require child services.

Construction Cost: >$6,500,000

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	JBrown Professional Group Inc.	Gainesville, FL	Principal Civil Engineering Firm
b.	N/A	N/A	N/A
c.	N/A	N/A	N/A
d.	N/A	N/A	N/A
e.	N/A	N/A	N/A
f.	N/A	N/A	N/A

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)*
SW 9th Street (Gainesville, FL)	2013	2014

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
City of Gainesville	Sarah Vidal	(352) 393-8203

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

Description: This project, performed for the City of Gainesville Community Redevelopment Agency, was a key part of the redevelopment of the former Alachua General Hospital (AGH) site and surrounding properties into the Innovation Hub and Innovation Square, which is a 12-block urban mixed-use research district that integrates new development into the existing urban fabric.

SW 9th Street was envisioned as a “green” road, using the latest in urban design concepts to provide a pedestrian-friendly space acting as a north-south spine in Innovation Square. Both the roadway and pedestrian facilities were designed with multi-colored concrete, and cascading bio-retention stormwater cells were designed along the west side of the road to provide stormwater treatment utilizing the latest in low-impact development concepts.

A new pocket park was also incorporated into the design, which includes a large bio-retention facility with multiple retention cells cascading into one another. The project included roadway design, drainage design, utility accommodation, electrical and lighting design, and significant landscape and hardscape design.

Relevance: Every public entity needs a design consultant that can handle roadway projects like the SW 9th Street project in Gainesville. Being an APWA National Roadway Project of the Year (Less than $5M), this project demonstrates JBPro’s capability and standard of excellence that it would provide the Creekview CDD on roadway projects like this one.

Construction Cost: >$2,400,000,000

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	JBrown Professional Group Inc	Gainesville, FL	Principal Civil Engineering Firm
b.	N/A	N/A	N/A
c.	N/A	N/A	N/A
d.	N/A	N/A	N/A
e.	N/A	N/A	N/A
f.	N/A	N/A	N/A

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
Jay Brown, PE	Principal Engineer		X		X		X	X			X
Chris Potts, PE	Director of Civil Engineering	X	X	X	X	X					
Logan Peters, PE	Project Manager		X				X		X	X	X
Troy Wright, PSM	Principal Surveyor		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	The Villages CDD	6	Depot Park
2	Tara Forest CDD	7	City of Alachua Plan Review Services
3	Seminole Improvement District	8	UF-642 - SW Campus Transportation Improvements
4	Town of Tioga	9	St. Anne Early Learning Center
5	Tara Oaks CDD	10	SW 9th Street

H. ADDITIONAL INFORMATION

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

Please see sections 1 to 5 in the RFQ response package for additional information.

I. AUTHORIZED REPRESENTATIVE

The foregoing is a statement of facts.

31. SIGNATURE	32. DATE
	09-20-2021

33. NAME AND TITLE

A.J. "Jay" Brown Jr., President & Principal 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	JBrown Professional Group Inc. (JBPro)
3. YEAR ESTABLISHED	2013
4. UNIQUE ENTITY IDENTIFIER	EIN 46-3710755
2b. STREET	4420 US-1 S, Suite 1
2c. CITY	St. Augustine
2d. STATE	FL
2e. ZIP CODE	32086
5. OWNERSHIP a. TYPE	S-Corporation
b. SMALL BUSINESS STATUS	Small Business Enterprise
6a. POINT OF CONTACT NAME AND TITLE	Jay Brown, Principal Engineer & President
6b. TELEPHONE NUMBER	(904) 789-8999
6c. EMAIL ADDRESS	jay.brown@jbpro.com
7. NAME OF FIRM *(If Block 2a is a Branch Office)*	JBrown Professional Group Inc (JBPro)

8a. FORMER FIRM NAME(S) *(If any)*	8b. YEAR ESTABLISHED	8c. UNIQUE ENTITY IDENTIFIER
Brown & Cullen, Inc.	1995	EIN 59-3332840

9. EMPLOYEES BY DISCIPLINE

a. Function Code	b. Discipline	c. Number of Employees (1) FIRM	(2) BRANCH
12	Civil Engineering	11	2
38	Land Surveying	17	6
02	Adminstration	4	0
	Other Employees		
	Total	32	8

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)*
I01	Industrial Buildings; Manufacturing Plant	2
I06	Irrigation; Drainage	2
L02	Land Surveying	4
001	Office Buildings; Industrial Parks	2
P05	Planning (Community, Regional, Are	1
R04	Recreation Facilities (Parks, Marinas	2
V03	Utilities (Gas and Steam)	2
S13	Storm Water Handling & Facilities	2
W02	Water Resources; Hydrology; Grou	1
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	6
c. Total Work	6

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 09-20-2021

c. NAME AND TITLE A.J. "Jay" Brown Jr., President & Principal Engineer

JBPro

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

12D

Creekview Community Development District

Request for Qualifications – District Engineering Services

Competitive Selection Criteria

		Ability and Adequacy of Professional Personnel	Consultant's Past Performance	Geographic Location	Willingness to Meet Time and Budget Requirements	Certified Minority Business Enterprise	Recent, Current and Projected Workloads	Volume of Work Previously Awarded to Consultant by District	TOTAL SCORE
	weight factor	**25**	**25**	**20**	**15**	**5**	**5**	**5**	**100**
	NAME OF RESPONDENT								
1	**England-Thims & Miller, Inc.**								
2	**JBrown Professional Group, Inc.**								

Board Member's Signature

Date

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

13A

PUBLISHER AFFIDAVIT
CLAY TODAY
Published Weekly
Orange Park, Florida

STATE OF FLORIDA
COUNTY OF CLAY:

Before the undersigned authority personally appeared Jon Cantrell, who on oath says that he is the publisher of the "Clay Today" a newspaper published weekly at Orange Park in Clay County, Florida; that the attached copy of advertisement being a

REQUEST FOR QUALIFICATIONS

in the matter of

ENGINEERING SERVICES

LEGAL: 48454 ORDER: 329263

was published in said newspaper in the issues:

09/30/2021

Affiant further says that said "Clay Today" is a newspaper published at Orange Park, in said Clay County, Florida, and that the said newspaper has heretofore been continuously published in said Clay County, Florida, weekly, and has been entered as Periodical material matter at the post office in Orange Park, in said Clay County, Florida, for period of one year next proceeding the first publication of the attached copy of advertisement; and affiant further says that he has neither paid nor promised any person, firm or corporation any discount, rebate, commission or refund for the purpose of securing this advertisement for publication in the said newspaper.

Sworn to me and subscribed before me 09/30/2021.

Christie Lou Wayne
NOTARY PUBLIC, STATE OF FLORIDA

NOTARY PUBLIC STATE OF FLORIDA
CHRISTIE LOU WAYNE
MY COMMISSION # HH34426
EXPIRES: September 20, 2024

3515 US HWY 17 Suite A, Fleming Island FL 32003
Telephone (904) 264-3200 - FAX (904) 264-3285
E-Mail: Christie@opcfla.com

REQUEST FOR PROPOSALS FOR ANNUAL AUDIT SERVICES
CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

The Creekview Community Development District hereby requests proposals for annual financial auditing services. The proposal must provide for the auditing of the District's financial records for the fiscal year ending September 30, 2021, with an option for with an option for additional annual renewals, subject to mutual agreement by both parties. The District is a local unit of special-purpose government created under Chapter 190, Florida Statutes, for the purpose of financing, constructing, and maintaining public infrastructure. The District is located in Leesburg, Florida. The final contract will require that, among other things, the audit for the fiscal year ending September 30, 2021, be completed no later than June 30, 2022.

The auditing entity submitting a proposal must be duly licensed under Chapter 473, Florida Statutes, and be qualified to conduct audits in accordance with "Government Auditing Standards," as adopted by the Florida Board of Accountancy. Audits shall be conducted in accordance with Florida Law and particularly Section 218.39, Florida Statutes, and the rules of the Florida Auditor General.

Proposal packages, which include evaluation criteria and instructions to proposers, are available from the District Manager at the address and telephone number listed below.

Proposers must provide one (1) electronic copy and one (1) unbound copy of their proposal to the offices of the District Manager, located at 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431 ("**District Manager**"), in an envelope marked on the outside "Auditing Services, Creekview Community Development District." Proposals must be received by 12:00 p.m., on October 15, 2021, at the office of the District Manager. Please direct all questions regarding this Notice to the District Manager.

District Manager

Legal 48454 published Sept 30, 2021 in Clay County's Clay Today newspaper

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

13B

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS FOR ANNUAL AUDIT SERVICES

The Creekview Community Development District hereby requests proposals for annual financial auditing services. The proposal must provide for the auditing of the District's financial records for the fiscal year ending September 30, 2021, with an option for with an option for additional annual renewals, subject to mutual agreement by both parties. The District is a local unit of special-purpose government created under Chapter 190, *Florida Statutes*, for the purpose of financing, constructing, and maintaining public infrastructure. The District is located in Leesburg, Florida. The final contract will require that, among other things, the audit for the fiscal year ending September 30, 2021, be completed no later than June 30, 2022.

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District Manager

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

REQUEST FOR PROPOSALS
Annual Auditing Services for Fiscal Year 2021
Clay County, Florida

INSTRUCTIONS TO PROPOSERS

SECTION 1. DUE DATE. Sealed proposals must be received no later than **October 15, 2021**, at 12:00 p.m., at the offices of District Manager, located at 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431. Proposals will be publicly opened at that time.

SECTION 2. FAMILIARITY WITH THE LAW. By submitting a proposal, the Proposer is assumed to be familiar with all federal, state, and local laws, ordinances, rules and regulations that in any manner affect the work. Ignorance on the part of the Proposer will in no way relieve it from responsibility to perform the work covered by the proposal in compliance with all such laws, ordinances and regulations.

SECTION 3. QUALIFICATIONS OF PROPOSER. The contract, if awarded, will only be awarded to a responsible Proposer who is qualified by experience and licensing to do the work specified herein. The Proposer shall submit with its proposal satisfactory evidence of experience in similar work and show that it is fully prepared to complete the work to the satisfaction of the District.

SECTION 4. SUBMISSION OF ONLY ONE PROPOSAL. Proposers shall be disqualified and their proposals rejected if the District has reason to believe that collusion may exist among the Proposers, the Proposer has defaulted on any previous contract or is in arrears on any previous or existing contract, or for failure to demonstrate proper licensure and business organization.

SECTION 5. SUBMISSION OF PROPOSAL. Submit one (1) electronic copy and one (1) unbound copy of the Proposal Documents, and other requested attachments at the time and place indicated herein, which shall be enclosed in an opaque sealed envelope, marked with the title "Auditing Services – Creekview Community Development District" on the face of it. **Please include pricing for each additional bond issuance.**

SECTION 6. MODIFICATION AND WITHDRAWAL. Proposals may be modified or withdrawn by an appropriate document duly executed and delivered to the place where proposals are to be submitted at any time prior to the time and date the proposals are due. No proposal may be withdrawn after opening for a period of ninety (90) days.

SECTION 7. PROPOSAL DOCUMENTS. The proposal documents shall consist of the notice announcing the request for proposals, these instructions, the Evaluation Criteria

Sheet and a proposal with all required documentation pursuant to Section 12 of these instructions ("**Proposal Documents**").

SECTION 8. PROPOSAL. In making its proposal, each Proposer represents that it has read and understands the Proposal Documents and that the proposal is made in accordance therewith.

SECTION 9. BASIS OF AWARD/RIGHT TO REJECT. The District reserves the right to reject any and all proposals, make modifications to the work, and waive any informalities or irregularities in proposals as it is deemed in the best interests of the District.

SECTION 10. CONTRACT AWARD. Within fourteen (14) days of receipt of the Notice of Award from the District, the Proposer shall enter into and execute a Contract (engagement letter) with the District.

SECTION 11. LIMITATION OF LIABILITY. Nothing herein shall be construed as or constitute a waiver of the District's limited waiver of liability contained in Section 768.28, *Florida Statutes*, or any other statute or law.

SECTION 12. MISCELLANEOUS. All proposals shall include the following information in addition to any other requirements of the proposal documents.

A. List the position or title of all personnel to perform work on the District audit. Include resumes for each person listed; list years of experience in present position for each party listed and years of related experience.

B. Describe proposed staffing levels, including resumes with applicable certifications.

C. Three references from projects of similar size and scope. The Proposer should include information relating to the work it conducted for each reference as well as a name, address and phone number of a contact person.

D. The lump sum cost of the provision of the services under the proposal, plus the lump sum cost of four (4) annual renewals.

SECTION 13. PROTESTS. In accordance with the District's Rules of Procedure, any protest regarding the Proposal Documents, must be filed in writing, at the offices of the District Manager, within seventy-two (72) calendar hours (excluding Saturday, Sunday, and state holidays) after the receipt of the Proposal Documents. The formal protest setting forth with particularity the facts and law upon which the protest is based shall be filed within seven (7) calendar days (including Saturday, Sunday, and state holidays) after the initial notice of protest was filed. Failure to timely file a notice of protest or failure to

timely file a formal written protest shall constitute a waiver of any right to object or protest with respect to the aforesaid Proposal Documents.

SECTION 14. EVALUATION OF PROPOSALS. The criteria to be used in the evaluation of proposals are presented in the Evaluation Criteria Sheet, contained within the Proposal Documents.

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT
AUDITOR SELECTION
EVALUATION CRITERIA

1. Ability of Personnel. **(20 Points)**

(E.g., geographic location of the firm's headquarters or permanent office in relation to the project; capabilities and experience of key personnel; present ability to manage this project; evaluation of existing work load; proposed staffing levels, etc.)

2. Proposer's Experience. **(20 Points)**

(E.g. past record and experience of the Proposer in similar projects; volume of work previously performed by the firm; past performance for other or current Community Development District(s) in other contracts; character, integrity, reputation of Proposer, etc.)

3. *Understanding of Scope of Work.* **(20 Points)**

Extent to which the proposal demonstrates an understanding of the District's needs for the services requested.

4. Ability to Furnish the Required Services. **(20 Points)**

Extent to which the proposal demonstrates the adequacy of Proposer's financial resources and stability as a business entity necessary to complete the services required.

5. Price. **(20 Points)*****

Points will be awarded based upon the lowest total proposal for rendering the services and the reasonableness of the proposal. **Please include pricing for each additional bond issuance.**

Total **(100 Points)**

***Alternatively, the Board may choose to evaluate firms without considering price, in which case the remaining categories would be assigned 25 points each.

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

13CI

CREEKVIEW
COMMUNITY DEVELOPMENT DISTRICT

PROPOSAL FOR AUDIT SERVICES

PROPOSED BY:

Berger, Toombs, Elam, Gaines & Frank

CERTIFIED PUBLIC ACCOUNTANTS, PL

---

600 Citrus Avenue, Suite 200
Fort Pierce, Florida 34950

(772) 461-6120

CONTACT PERSON:

J. W. Gaines, CPA, Director

DATE OF PROPOSAL:

October 15, 2021

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Berger, Toombs, Elam,
Gaines & Frank

Certified Public Accountants PL

600 Citrus Avenue
Suite 200
Fort Pierce, Florida 34950

772/461-6120 // 461-1155
FAX: 772/468-9278

October 15, 2021

Creekview Community Development District
Wrathell, Hunt & Associates
2300 Glades Road, Suite 410W
Boca Raton, FL 33431

Dear District Manager:

Thank you very much for the opportunity to present our professional credentials to provide audit services for Creekview Community Development District.

Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL has assembled a team of governmental and nonprofit specialists second to none to serve our clients. Our firm has the necessary qualifications and experience to serve as the independent auditors for Creekview Community Development District. We will provide you with top quality, responsive service.

Experience

Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL is a recognized leader in providing services to governmental and nonprofit agencies throughout Florida. We have been the independent auditors for a number of local governmental agencies and through our experience in performing their audits, we have been able to increase our audit efficiency and; therefore, reduce costs. We have continually passed this cost savings on to our clients and will continue to do so in the future. As a result of our experience and expertise, we have developed an effective and efficient audit approach designed to meet or exceed the performance specifications in accordance with auditing standards generally accepted in the United States of America, the standards applicable to financial audits contained in Government Auditing Standards, issued by the Comptroller General of the United States, and the standards for financial and compliance audits. We will conduct the audit in accordance with auditing standards generally accepted in the United States of America; "Government Auditing Standards" issued by the Comptroller General of the United States; the provisions of the Single Audit Act, Subpart F of Title 2 US Code of Federal Regulations (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, with minimal disruption to your operations. Our firm has frequent technical updates to keep our personnel informed and up-to-date on all changes that are occurring within the industry.

Berger, Toombs, Elam,
Gaines & Frank
Certified Public Accountants PL

Creekview Community Development District
October 15, 2021

Our firm is a member of the Government Audit Quality Center, an organization dedicated to improving government audit quality. We also utilize the audit program software of a nationally recognized CPA firm to assure us that we are up to date with all auditing standards and to assist us maintain maximum audit efficiencies.

To facilitate your evaluation of our qualifications and experience, we have arranged this proposal to include a resume of our firm, including our available staff, our extensive prior governmental and nonprofit auditing experience and clients to be contacted.

You need a firm that will provide an efficient, cost-effective, high-quality audit within critical time constraints. You need a firm with the prerequisite governmental and nonprofit experience to perform your audit according to stringent legal and regulatory requirements, a firm that understands the complex nature of community development districts and their unique compliance requirements. You need a firm with recognized governmental and nonprofit specialists within the finance and governmental communities. And, certainly, you need a firm that will provide you with valuable feedback to enhance your current and future operations. Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL is that firm. J. W. Gaines is the person authorized to make representations for the firm.

Thank you again for the opportunity to submit this proposal to Creekview Community Development District.

Very truly yours,

Berger Toombs Elam
Gaines + Frank

Berger, Toombs, Elam, Gaines & Frank
Certified Public Accountants PL
Fort Pierce, Florida

PROFILE OF THE PROPOSER

Description and History of Audit Firm

Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL is a Treasure Coast public accounting firm, which qualifies as a small business firm, as established by the Small Business Administration (13 CFR 121.38), with offices in Fort Pierce and Stuart. We are a member of the Florida Institute of Certified Public Accountants and the American Institute of Certified Public Accountants. The firm was formed from the merger of Edwards, Berger, Harris & Company (originated in 1972) and McAlpin, Curtis & Associates (originated in 1949). J. W. Gaines and Associates (originated in 1979) merged with the firm in 2004. Our tremendous growth rate experienced over the last 71 years is directly attributable to the firm's unrelenting dedication to providing the highest quality, responsive professional services attainable to its clients.

We are a member of the Private Companies Practice Section (PCPS) of the American Institute of Certified Public Accountants (AICPA) to assure we meet the highest standards. Membership in this practice section requires that our firm meet more stringent standards than standard AICPA membership. These rigorous requirements include the requirement of a triennial peer review of our firm's auditing and accounting practice and annual Continuing Professional Education (CPE) for all accounting staff (whether CPA or non-CPA). For standard AICPA membership, only a quality review is required and only CPAs must meet CPE requirements.

We are also a member of the Government Audit Quality Center ("the Center") of the American Institute of Certified Public Accountants to assure the quality of our government audits. Membership in the Center, which is voluntary, requires our firm to comply with additional standards to promote the quality of government audits.

We have been extensively involved in serving local government entities with professional accounting, auditing and consulting services throughout the entire 71 year history of our firm. Our substantial experience over the years makes us uniquely qualified to provide accounting, auditing, and consulting services to these clients. We are a recognized leader in providing services to governmental and nonprofit agencies on the Treasure Coast and in Central and South Florida, with extensive experience in auditing community development districts and water control districts. We were the independent auditors of the City of Fort Pierce for over 37 years and currently, we are the independent auditors for St. Lucie County since 2002, and for 38 of the 42 years that the county has been audited by CPA firms. Additionally, we have performed audits of the City of Stuart, the City of Vero Beach, Indian River County and Martin County. We also presently audit over 75 Community Development Districts throughout Florida.

Our firm was founded on the belief that we are better able to respond to our clients needs through education, experience, independence, quality control, and personal service. Our firm's commitment to quality is reflected in our endeavor of professional excellence via continuing education, the use of the latest computer technology, professional membership in PCPS and peer review.

We believe our approach to audit engagements, intelligence and innovation teamed with sound professional judgment enables us to explore new concepts while remaining sensitive to the fundamental need for practical solutions. We take pride in giving you the assurance that the personal assistance you receive comes from years of advanced training, technical experience and financial acumen.

Professional Staff Resources

Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL has a total of 32 professional and administrative staff (including 14 professional staff with extensive experience servicing government entities). The work will be performed out of our Fort Pierce office with a proposed staff of one senior accountant and one or two staff accountants supervised by an audit manager and audit partner. With the exception of the directors of the firm's offices, the professional staff is not specifically assigned to any of our individual offices. The professional and administrative staff resources available to you through Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL are as follows:

	Total
Partners/Directors (CPA's)	5
Principals (CPA)	1
Managers (CPA)	1
Senior/Supervisor Accountants (2 CPA's)	3
Staff Accountants (1 CPA)	9
Computer Specialist	1
Paraprofessional	8
Administrative	4
Total – all personnel	32

Following is a brief description of each employee classification:

Staff Accountant – Staff accountants work directly under the constant supervision of the auditor-in-charge and, are responsible for the various testing of documents, account analysis and any other duties as his/her supervisor believes appropriate. Minimum qualification for a staff accountant is graduation from an accredited university or college with a degree in accounting or equivalent.

Senior Accountant – A senior accountant must possess all the qualifications of the staff accountant, in addition to being able to draft the necessary reports and financial statements, and supervise other staff accountants when necessary.

Managers – A manager must possess the qualifications of the senior accountant, plus be able to work without extensive supervision from the auditor-in-charge. The manager should be able to draft audit reports from start to finish and to supervise the audit team, if necessary.

Principal – A principal is a partner/director in training. He has been a manager for several years and possesses the technical skills to act as the auditor–in-charge. A principal has no financial interest in the firm.

Partner/Director – The director has extensive governmental auditing experience and acts as the auditor-in-charge. Directors have a financial interest in the firm.

Professional Staff Resources (Continued)

Independence – Independence of the public accounting firm, with respect to the audit client, is the foundation from which the public gains its trust in the opinion issued by the public accounting firm at the end of the audit process. This independence must be in appearance as well as in fact. The public must perceive that the accounting firm is independent of the audit entity to ensure that nothing would compromise the opinion issued by the public accounting firm. **Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL** is independent of Creekview Community Development District, including its elected officials and related parties, at the date of this proposal, as defined by the following rules, regulations, and standards:

AuSection 220 – Statements on Auditing Standards issued by the American Institute of Certified Public Accountants;

ET Sections 101 and 102 – Code of Professional Conduct of the American Institute of Certified Public Accountants;

Chapter 21A-1, Florida Administrative Code;

Section 473.315, Florida Statutes; and,

Government Auditing Standards, issued by the Comptroller General of the United States.

On an annual basis, all members of the firm are required to confirm, in writing, that they have no personal or financial relationships or holding that would impair their independence with regard to the firm's clients.

Independence is a hallmark of our profession. We encourage our staff to use professional judgment in situations where our independence could be impaired or the perception of a conflict of interest might exist. In the governmental sector, public perception is as important as professional standards. Therefore, the utmost care must be exercised by independent auditors in the performance of their duties.

Ability to Furnish the Required Services

As previously noted in the Profile of the Proposer section of this document, our firm has been in existence for over 69 years. We have provided audit services to some clients for over 30 years continually. Our firm is insured against physical loss through commercial insurance and we also carry liability insurance. The majority of our audit documentation is stored electronically, both on our office network and on each employee laptop or computer assigned to each specific job. Our office computer network is backed up on tape, so in the event of a total equipment loss, we can restore all data as soon as replacement equipment is acquired. In addition, our field laptop computers carry the same data and can be used in the event of emergency with virtually no delay in completing the required services.

ADDITIONAL SERVICES PROVIDED

Arbitrage Rebate Services

Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL also provides arbitrage rebate compliance and related services to governmental issuers. The Tax Reform Act of 1986 requires issuers of most tax-exempt obligations to pay (i.e., "rebate") to the United States government any arbitrage profits. Arbitrage profits are earnings on the investment of bond proceeds and certain other monies in excess of what would have been earned had such monies been invested at a yield equal to the yield on the bonds.

Federal tax law requires that interim rebate calculations and payments are due at the end of every fifth bond year. Final payment is required upon redemption of the bonds. More frequent calculations may be deemed advisable by an issuer's auditor, trustee or bond counsel or to assure that accurate and current records are available. These more frequent requirements are usually contained in the Arbitrage or Rebate Certificate with respect to the bonds.

Our firm performs a comprehensive rebate analysis and includes the following:

- Verifying that the issue is subject to rebate;
- Calculating the bond yield;
- Identifying, and separately accounting for, all "Gross Proceeds" (as that term is defined in the Code) of the bond issue, including those requiring analysis due to "transferred proceeds" and/or "commingled funds" circumstances;
- Determining what general and/or elective options are available to Gross proceeds of the issue;
- Calculating the issue's excess investment earning (rebate liability), if any;
- Delivering appropriate documentation to support all calculations;
- Providing an executive summary identifying the methodology employed, major assumptions, conclusions, and any other recommendations for changes in recordkeeping and investment policies;
- Assisting as necessary in the event of an Internal Revenue Service inquiry; and,
- Consulting with issue staff, as necessary, regarding arbitrage related matters.

GOVERNMENTAL AUDITING EXPERIENCE

Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL has been practicing public accounting in Florida for 69 years. Our success over the years has been the result of a strong commitment to providing personalized quality service to our clients.

The current members of our firm have performed audits of over 900 community development districts, and over 1,800 audits of municipalities, counties and other governmental entities such as the City of Fort Pierce and St. Lucie County.

Our firm provides a variety of accounting, auditing, tax litigation support, and consulting services. Some of the professional accounting, auditing and management consulting services that are provided by our firm are listed below:

- Performance of annual financial and compliance audits, including Single Audits of state and federal financial assistance programs, under the provisions of the Single Audit Act, Subpart F of Title 2 U.S. Code of Federal Regulations (CFR) Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance), with minimal disruptions to your operations;
- Performance of special compliance audits to ascertain compliance with the applicable local, state and federal laws and regulations;
- Issuance of comfort letters and consent letters in conjunction with the issuance of tax-exempt debt obligations, including compiling financial data and interim period financial statement reviews;
- Calculation of estimated and actual federal arbitrage rebates;
- Assistance in compiling historical financial data for first-time and supplemental submissions for GFOA Certificate of Achievement for Excellence in Financial Reporting;
- Preparation of indirect cost allocation systems in accordance with Federal and State regulatory requirements;
- Providing human resource and employee benefit consulting;
- Performance of automation feasibility studies and disaster recovery plans;
- Performance feasibility studies concerning major fixed asset acquisitions and utility plant expansion plans (including electric, water, pollution control, and sanitation utilities); and
- Assistance in litigation, including testimony in civil and criminal court.
- Assist clients who utilize QuickBooks software with their software needs. Our Certified QuickBooks Advisor has undergone extensive training through QuickBooks and has passed several exams to attain this Certification.

Continuing Professional Education

All members of the governmental audit staff of our firm, and audit team members assigned to this engagement, are in compliance with the Continuing Professional Education (CPE) requirements set forth in Government Auditing Standards issued by the Comptroller General of the United States. In addition, our firm is in compliance with the applicable provisions of the Florida Statutes that require CPA's to have met certain CPE requirements prior to proposing on governmental audit engagements.

GOVERNMENTAL AUDITING EXPERIENCE (CONTINUED)

The audit team has extensive experience in performing governmental audits and is exposed to intensive and continuing concentration on these types of audits. Due to the total number of governmental audits our team performs, each member of our governmental staff must understand and be able to perform several types of governmental audits. It is our objective to provide each professional employee fifty hours or more of comprehensive continuing professional education each year. This is accomplished through attending seminars throughout Florida and is reinforced through in-house training.

Our firm has made a steadfast commitment to professional education. Our active attendance and participation in continuing professional education is a major part of our objective to obtain the most recent knowledge on issues which are of importance to our clients. We are growing on the reputation for work that our firm is providing today.

Quality Control Program

Quality control requires continuing commitment to professional excellence. **Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL** is formally dedicated to that commitment.

To ensure maintaining the standards of working excellence required by our firm, we joined the Private Companies Practice Section (PCPS) of the American Institute of Certified Public Accountants (AICPA). To be a participating member firm of this practice section, a firm must obtain an independent Peer Review of its quality control policies and procedures to ascertain the firm's compliance with existing auditing standards on the applicable engagements.

The scope of the Peer Review is comprehensive in that it specifically reviews the following quality control policies and procedures of the participating firm:

- Professional, economic, and administrative independence;
- Assignment of professional personnel to engagements;
- Consultation on technical matters;
- Supervision of engagement personnel;
- Hiring and employment of personnel;
- Professional development;
- Advancement;
- Acceptance and continuation of clients; and,
- Inspection and review system.

We believe that our commitment to the program is rewarding not only to our firm, but primarily to our clients.

The external independent Peer Review of the elements of our quality control policies and procedures performed by an independent certified public accountant, approved by the PCPS of the AICPA, provides you with the assurance that we continue to conform to standards of the profession in the conduct of our accounting and auditing practice.

GOVERNMENTAL AUDITING EXPERIENCE (CONTINUED)

Our firm is also a member of Governmental Audit Quality Center (GAQC), a voluntary membership center for CPA firms that perform governmental audits. This center promotes the quality of governmental audits.

Our firm has completed successive Peer Reviews. These reviews included a representative sample of our firm's local governmental auditing engagements. As a result of these reviews, our firm obtained an unqualified opinion on our quality control program and work procedures. On page 31 is a copy of our most recent Peer Review report. It should be noted that we received a pass rating.

Our firm has never had any disciplinary actions by state regulatory bodies or professional organizations.

As our firm performs approximately one hundred fifty audits each year that are reviewed by federal, state or local entities, we are constantly dealing with questions from these entities about our audits. We are pleased to say that any questions that have been raised were minor issues and were easily resolved without re-issuing any reports.

Certificate of Achievement for Excellence in Financial Reporting (CAFR)

We are proud and honored to have been involved with the City of Fort Pierce and the Fort Pierce Utilities Authority when they received their first Certificates of Achievement for Excellence in Financial Reporting for the fiscal years ended September 30, 1988 and 1994, respectively. We were also instrumental in the City of Stuart receiving the award, in our first year of performing their audit, for the year ended September 30, 1999.

We also assisted St. Lucie County, Florida for the year ended September 30, 2003, in preparing their first Comprehensive Annual Financial Report, and St. Lucie County has received their Certificate of Achievement for Excellence in Financial Reporting every year since.

As continued commitment to insuring that we are providing the highest level of experience, we have had at least one employee of our firm serve on the GFOA – Special Review Committee since the mid-1980s. This committee is made up of selective Certified Public Accountants throughout the United States who have demonstrated their high level of knowledge and expertise in governmental accounting. Each committee member attends a special review meeting at the Annual GFOA Conference. At this meeting, the committee reports on the Certificate of Achievement Program's most recent results, future goals, and common reporting deficiencies.

We feel that our previous experience in assisting the City of Fort Pierce, the Fort Pierce Utilities Authority and St. Lucie County obtain their first CAFRs, and the City of Stuart in continuing to receive a CAFR and our firm's continued involvement with the GFOA, and the CAFR review committee make us a valued asset for any client in the field of governmental financial reporting.

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

References

Terracina Community Development District
Jeff Walker, Special District Services
(561) 630-4922

Gateway Community Development District
Stephen Bloom, Severn Trent Management
(954) 753-5841

The Reserve Community Development District

Darrin Mossing, Governmental Management Services LLC
(407) 841-5524

Port of the Islands Community Development District
Cal Teague, Premier District Management

(239) 690-7100 ext 101

In addition to the above, we have the following additional governmental audit experience:

Community Development Districts

Aberdeen Community Development District

Alta Lakes Community Development District

Amelia Concourse Community Development District

Amelia Walk Communnity Development District

Aqua One Community Development District

Arborwood Community Development District

Arlington Ridge Community Development District

Armstrong Community Development District

Avalon Park West Community Development District

Bartram Springs Community Development District

Baytree Community Development District

Beaumont Community Development District

Bella Collina Community Development District

Boggy Branch Community Development District

Boggy Creek Community Development District

Bonnet Creek Community Development District

Buckeye Park Community Development District

Candler Hills East Community Development District

Capital Region Community Development District

Cedar Hammock Community Development District

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Central Lake Community Development District

Channing Park Community Development District

Cheval West Community Development District

Clearwater Cay Community Development District

Coconut Cay Community Development District

Colonial Country Club Community Development District

Connerton West Community Development District

Copper Creek Community Development District

Copperstone Community Development District

Creekside at Twin Creeks Community

Deer Run Community Development District

Dowden West Community Development District

DP1 Community Development District

Durbin Crossing Community Development District

Eagle Point Community Development District

East Nassau Stewardship District

Eastlake Oaks Community Development District

Easton Park Community Development District

Eden Hills Community Development District

Estancia at Wiregrass Community Development District

Estates at Cherry Lake Community Development District

Evergreen Community Development District

Finley Woosd Community Development District

Gateway Services Community Development District

Gramercy Farms Community Development District

Greenway Improvement District

Greyhawk Landing Community Development District

Griffin Lakes Community Development District

Habitat Community Development District

Harmony Community Development District

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Harmony West Community Development District

Heritage Harbor South Community Development District

Heritage Lake Park Community Development District

Heritage Palms Community Development District

Highland Meadows II Community Development District

Laguna Lakes Community Development District

Lake Bernadette Community Development District

Landings at Miami Community Development District

Lexington Oaks Community Development District

Lucaya Community Development District

Magic Reserve Community Development District

Marhsall Creek Community Development District

Midtown Miami Community Development District

Montecito Community Development District

Narcoossee Community Development District

New Port Tampa Bay Community Development District

Hawkstone Community Development District

Heritage Isles Community Development District

Heritage Landing Community Development District

Heron Isles Community Development District

Julington Creek Community Development District

Lake Ashton Community Development District

Lakeside Plantation Community Development District

Legends Bay Community Development District

Live Oak No. 2 Community Development District

Madeira Community Development District

Magnolia Creek Community Development District

Meadow Pointe IV Community Development District

Mira Lago West Community Development District

Myrtle Creek Improvement District

Naturewalk Community Development District

Overoaks Community Development District

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Paseo Community Development District

Pine Ridge Plantation Community Development District

Poinciana West Community Development District

Portofino Isles Community Development District

Renaissance Commons Community District

Reserve at Pradera Community Development District

River Hall Community Development District

Rivers Edge Community Development District

Rolling Hills Community Development District

Ryals Creek Community Development District

San Simeon Community Development District

Six Mile Creek Community Development District

South Shore Community Development District

Southern Hills Plantation I Community Development District

Stoneybrook South at ChampionsGate Community Development District

Stoneybrook West Community Development District

Terracina Community Development District

Pier Park Community Development District

Piney Z Community Development District

Port of the Islands Community Development District

Quarry Community Development District

Reserve #2 Community Development District

Reserve Community Development District

River Place on the St. Lucie Community Development District

Riverwood Estates Community Development

Rolling Oaks Community Development District

Sampson Creek Community Development District

Sandmine Road Community Development District

South Fork Community Development District

South Village Community Development District

St. John's Forest Community Development District

Stoneybrook South Community Development District

Storey Creek Community Development District

Tison's Landing Community Development District

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Town of Kindred II Community Development District

TPOST Community Development District

Triple Creek Community Development District

TSR Community Development District

Turnbull Creek Community Development District

Twin Creeks North Community Development District

Urban Orlando Community Development District

Venetian Community Development District

Verano #2 Community Development District

Viera East Community Development District

VillaMar Community Development District

Vizcaya in Kendall Community Development District

Waterset North Community Development District

West Port Community Development District

Westside Community Development District

WildBlue Community Development District

Willow Creek Community Development District

Willow Hammock Community Development District

Wiregrass Community Development District

Wiregrass II Community Development District

Zephyr Ridge Community Development District

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Other Governmental Organizations

City of Westlake

Florida Inland Navigation District

Fort Pierce Farms Water Control District

Indian River Regional Crime Laboratory, District 19, Florida

Viera Stewardship District

Office of the Medical Examiner, District 19

Rupert J. Smith Law Library of St. Lucie County

St. Lucie Education Foundation

Seminole Improvement District

Troup Indiantown Water Control District

Current or Recent Single Audits,

St. Lucie County, Florida
Early Learning Coalition, Inc.
Treasure Coast Food Bank, Inc.

Gateway Services Community Development District

Members of our audit team have acquired extensive experience from performing or participating in over 2,100 audits of governments, independent special taxing districts, school boards, and other agencies that receive public money and utilize fund accounting.

Much of our firm's auditing experience is with compliance auditing, which is required for publicly financed agencies. In this type of audit, we do a financial examination and also confirm compliance with various statutory and regulatory guidelines.

Following is a summary of our other experience, including Auditor General experience, as it pertains to other governmental and fund accounting audits.

Counties
(Includes elected constitutional officers, utilities and dependent taxing districts)

Indian River
Martin
Okeechobee
Palm Beach

Municipalities

City of Port St. Lucie
City of Vero Beach
Town of Orchid

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Special Districts

Bannon Lakes Community Development District
Boggy Creek Community Development District
Capron Trail Community Development District
Celebration Pointe Community Development District
Coquina Water Control District
Diamond Hill Community Development District
Dovera Community Development District
Durbin Crossing Community Development District
Golden Lakes Community Development District
Lakewood Ranch Community Development District
Martin Soil and Water Conservation District
Meadow Pointe III Community Development District
Myrtle Creek Community Development District
St. Lucie County – Fort Pierce Fire District
The Crossings at Fleming Island
St. Lucie West Services District
Indian River County Mosquito Control District
St. John's Water Control District
Westchase and Westchase East Community Development Districts
Pier Park Community Development District
Verandahs Community Development District
Magnolia Park Community Development District

Schools and Colleges

Federal Student Aid Programs – Indian River Community College
Indian River Community College
Okeechobee County District School Board
St. Lucie County District School Board

State and County Agencies

Central Florida Foreign-Trade Zone, Inc. (a nonprofit organization affiliated with the St. Lucie County Board of County Commissioners)
Florida School for Boys at Okeechobee
Indian River Community College Crime Laboratory
Indian River Correctional Institution

FEE SCHEDULE

We propose the fee for our audit services described below to be $3,175 for the year ended September 30, 2021, $3,275 for the years ended September 30, 2022 and 2023, and $3,370 for the years ended September 30, 2024 and 2025. The fee is contingent upon the financial records and accounting systems of Creekview Community Development District being “audit ready” and the financial activity for the District is not materially increased. If we discover that additional preparation work or subsidiary schedules are needed, we will consult with your authorized representative. We can assist with this additional work at our standard rates should you desire.

SCOPE OF WORK TO BE PERFORMED

If selected as the District's auditors, we will perform a financial and compliance audit in accordance with Section 11.45, Florida Statutes, in order to express an opinion on an annual basis on the financial statements of Creekview Community Development District as of September 30, 2021, 2022, 2023, 2024, and 2025. The audits will be performed to the extent necessary to express an opinion on the fairness in all material respects with which the financial statements present the financial position, results of operations and changes in financial position in conformity with generally accepted accounting principles and to determine whether, for selected transactions, operations are properly conducted in accordance with legal and regulatory requirements. Reportable conditions that are also material weaknesses shall be identified as such in the Auditors' Report on Internal Control over Financial Reporting and on Compliance and Other Matters. Other (non-reportable) conditions discovered during the course of the audit will be reported in a separate letter to management, which will be referred to in the Auditors' Report on Internal Control over Financial Reporting and on Compliance and Other Matters.

Our audit will be performed in accordance with standards for financial and compliance audits contained in *Government Auditing Standards*, as well as in compliance with rules and regulations of audits of special districts as set forth by the State Auditor General in Chapter 10.550, Local Governmental Entity Audits, and other relevant federal, state and county orders, statutes, ordinances, charter, resolutions, bond covenants, Administrative Code and procedures, or rules and regulations which may pertain to the work required in the engagement.

The primary purpose of our audit will be to express an opinion on the financial statements discussed above. It should be noted that such audits are subject to the inherent risk that errors or irregularities may not be detected. However, if conditions are discovered which lead to the belief that material errors, defalcations or other irregularities may exist or if other circumstances are encountered that require extended services, we will promptly notify the appropriate individual.

Commitment to Quality Service

Personnel Qualifications and Experience

J. W. Gaines, CPA, CITP
Director – 41 years

Education
- Stetson University, B.B.A. – Accounting

Registrations
- Certified Public Accountant – State of Florida, State Board of Accountancy
- Certified Information Technology Professional (CITP) – American Institute of Certified Public Accountants

Professional Affiliations/Community Service
- Member of the American and Florida Institutes of Certified Public Accountants
- Affiliate member Government Finance Officers Association
- Past President, Vice President-Campaign Chairman, Vice President and Board Member of United Way of St. Lucie County, 1989 - 1994
- Past President, President Elect, Secretary and Treasurer of the Treasure Coast Chapter of the Florida Institute of Certified Public Accountants, 1988 - 1991
- Past President of Ft. Pierce Kiwanis Club, 1994 - 95, Member/Board Member since 1982
- Past President, Vice President and Treasurer of St. Lucie County Chapter of the American Cancer Society, 1980 -1986
- Member of the St. Lucie County Chamber of Commerce, Member Board of Directors, Treasurer, September 2002 - 2006, Chairman Elect 2007, Chairman 2008, Past Chairman 2009
- Member Lawnwood Regional Medical Center Board of Trustees, 2000 – Present, Chairman 2013 - Present
- Member of St. Lucie County Citizens Budget Committee, 2001 – 2002
- Member of Ft. Pierce Citizens Budget Advisory Committee, 2010 – 2011
- Member of Ft. Pierce Civil Service Appeals Board, 2013 - Present

Professional Experience
- Miles Grant Development/Country Club – Stuart, Florida, July 1975 – October 1976
- State Auditor General's Office – Public Accounts Auditor – November 1976 through September 1979
- Director - Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants PL, responsible for numerous government and nonprofit audits.
- Over 40 years experience in all phases of public accounting and auditing experience, with a concentration in financial and compliance audits. Mr. Gaines has been involved in all phases of the audits listed on the preceding pages.

Personnel Qualifications and Experience

J. W. Gaines, CPA, CITP (Continued)
Director

Continuing Professional Education

- Has participated in numerous continuing professional education courses provided by nationally recognized sponsors over the last two years to keep abreast of the latest developments in accounting and auditing such as:
  Governmental Accounting Report and Audit Update
  Analytical Procedures, FICPA
  Annual Update for Accountants and Auditors
  Single Audit Sampling and Other Considerations

Commitment to Quality Service

Personnel Qualifications and Experience

David S. McGuire, CPA, CITP
Accounting and Audit Principal – 18 years
Accounting and Audit Manager – 4 years
Staff Accountant – 11 years

Education
- University of Central Florida, B.A. – Accounting
- Barry University – Master of Professional Accountancy

Registrations
- Certified Public Accountant – State of Florida, State Board of Accountancy
- Certified Information Technology Professional (CITP) – American Institute of Certified Public Accountants
- Certified Not-For-Profit Core Concepts 2018

Professional Affiliations/Community Service
- Member of the American and Florida Institutes of Certified Public Accountants
- Associate Member, Florida Government Finance Office Associates
- Assistant Coach – St. Lucie County Youth Football Organization (1994 – 2005)
- Assistant Coach – Greater Port St. Lucie Football League, Inc. (2006 – 2010)
- Board Member – Greater Port St. Lucie Football League, Inc. (2011 – 2017)
- Treasurer, AIDS Research and Treatment Center of the Treasure Coast, Inc. (2000 – 2003)
- Board Member/Treasurer, North Treasure Coast Chapter, American Red Cross (2004 – 2010)
- Member/Board Member of Port St. Lucie Kiwanis (1994 – 2001)
- President (2014/15) of Sunrise Kiwanis of Fort Pierce (2004 – 2017)
- St. Lucie District School Board Superintendent Search Committee (2013 – present)
- Board Member – Phrozen Pharoes (2019-2021)

Professional Experience
- Twenty-eight years public accounting experience with an emphasis on nonprofit and governmental organizations.
- Audit Manager in-charge on a variety of audit and review engagements within several industries, including the following government and nonprofit organizations:
  - St. Lucie County, Florida
  - 19th Circuit Office of Medical Examiner
  - Troup Indiantown Water Control District
  - Exchange Club Center for the Prevention of Child Abuse, Inc.
  - Healthy Kids of St. Lucie County
  - Mustard Seed Ministries of Ft. Pierce, Inc.
  - Reaching Our Community Kids, Inc.
  - Reaching Our Community Kids - South
  - St. Lucie County Education Foundation, Inc.
  - Treasure Coast Food Bank, Inc.
  - North Springs Improvement District
- Four years of service in the United States Air Force in computer operations, with a top secret (SCI/SBI) security clearance.

Personnel Qualifications and Experience

David S. McGuire, CPA, CITP (Continued)
Accounting and Audit Principal

Continuing Professional Education

- Mr. McGuire has attended numerous continuing professional education courses and seminars taught by nationally recognized sponsors in the accounting auditing and single audit compliance areas. He has attended courses over the last two years in those areas as follows:
  - Not-for-Profit Auditing Financial Results and Compliance Requirements
  - Update: Government Accounting Reporting and Auditing
  - Annual Update for Accountants and Auditors

Commitment to Quality Service

Personnel Qualifications and Experience

David F. Haughton, CPA
Accounting and Audit Manager – 30 years

Education
- Stetson University, B.B.A. – Accounting

Registrations
- Certified Public Accountant – State of Florida, State Board of Accountancy

Professional Affiliations/Community Service
- Member of the American and Florida Institutes of Certified Public Accountants
- Former Member of Florida Institute of Certified Public Accountants Committee on State and Local Government
- Affiliate Member Government Finance Officers Association (GFOA) for over 10 years
- Affiliate Member Florida Government Finance Officers Association (FGFOA) for over 10 years
- Technical Review – 1997 FICPA Course on State and Local Governments in Florida
- Board of Directors – Kiwanis of Ft. Pierce, Treasurer – 1994-1999; Vice President – 1999-2001

Professional Experience
- Twenty-seven years public accounting experience with an emphasis on governmental and nonprofit organizations.
- State Auditor General's Office – West Palm Beach, Staff Auditor, June 1985 to September 1985
- Accounting and Audit Manager of Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants PL, responsible for audit and accounting services including governmental and not-for-profit audits.
- Over 20 years of public accounting and governmental experience, specializing in governmental and nonprofit organizations with concentration in special districts, including Community Development Districts which provide services including water and sewer utilities. Governmental and non-profit entities served include the following:

  Counties:
  St. Lucie County

  Municipalities:
  City of Fort Pierce
  City of Stuart

Personnel Qualifications and Experience

David F. Haughton, CPA (Continued)
Accounting and Audit Manager

Professional Experience (Continued)

Special Districts:
Bluewaters Community Development District
Country Club of Mount Dora Community Development District
Fiddler's Creek Community Development District #1 and #2
Indigo Community Development District
North Springs Improvement District
Renaissance Commons Community Development District
St. Lucie West Services District
Stoneybrook Community Development District
Summerville Community Development District
Terracina Community Development District
Thousand Oaks Community Development District
Tree Island Estates Community Development District
Valencia Acres Community Development District

Non-Profits:
The Dunbar Center, Inc.
Hibiscus Children's Foundation, Inc.
Hope Rural School, Inc.
Maritime and Yachting Museum of Florida, Inc.
Tykes and Teens, Inc.
United Way of Martin County, Inc.
Workforce Development Board of the Treasure Coast, Inc.

- While with the Auditor General's Office he was on the staff for the state audits of the Martin County School District and Okeechobee County School District.
- During 1997 he performed a technical review of the Florida Institute of Certified Public Accountants state CPE course on Audits of State and Local Governments in Florida. His comments were well received by the author and were utilized in future updates to the course.

Continuing Professional Education

- During the past several years, he has participated in numerous professional development training programs sponsored by the AICPA and FICPA, including state conferences on special districts and governmental auditing in Florida. He averages in excess of 100 hours bi-annually of advanced training which exceeds the 80 hours required in accordance with the continuing professional education requirements of the Florida State Board of accountancy and the AICPA Private Companies Practice Section. He has over 75 hours of governmental CPE credit within the past two years.

Commitment to Quality Service

Personnel Qualifications and Experience

Matthew Gonano, CPA
Senior Staff Accountant – 10 years

Education
- University of North Florida, B.B.A. – Accounting
- University of Alicante, Spain – International Business
- Florida Atlantic University – Masters of Accounting

Professional Affiliations/Community Service

- American Institute of Certified Public Accountants
- Florida Institute of Certified Public Accountants

Professional Experience

- Senior Accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.
- Performed audits of nonprofit and governmental organizations in accordance with Governmental Accounting Auditing Standards (GAAS)
- Performed Single Audits of nonprofit organizations in accordance with OMB Circular A-133, Audits of State, Local Governments, and Non-Profit Organizations.

Continuing Professional Education
- Mr. Gonano has participated in numerous continuing professional education courses.

Commitment to Quality Service

Personnel Qualifications and Experience

Paul Daly
Staff Accountant – 9 years

Education
- Florida Atlantic University, B.S. – Accounting

Professional Experience
- Staff Accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

Continuing Professional Education
- Working to attain the requirements to take the Certified Public Accounting (CPA) exam.

Commitment to Quality Service

Personnel Qualifications and Experience

Melissa Marlin, CPA
Senior Staff Accountant – 8 years

Education
- Indian River State College, A.A. – Accounting
- Florida Atlantic University, B.B.A. – Accounting

Professional Experience
- Staff accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

Continuing Professional Education
- Mrs. Marlin participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.

Personnel Qualifications and Experience

Bryan Snyder
Staff Accountant – 5 years

Education
- Florida Atlantic University, B.B.A. – Accounting

Professional Experience
- Accountant beginning his professional auditing career with Berger, Toombs, Elam, Gaines, & Frank.
- Mr. Snyder is gaining experience auditing governmental & nonprofit entities.

Continuing Professional Education
- Mr. Snyder participates in numerous continuing education courses and plans on working to acquire his CPA certificate.
- Mr. Snyder is currently studying to pass the CPA exam.

Personnel Qualifications and Experience

Maritza Stonebraker, CPA
Staff Accountant – 4 years

Education
- Indian River State College, B.S.A. – Accounting

Professional Experience
- Staff Accountant beginning her professional auditing career with Berger, Toombs, Elam, Gaines, & Frank.

Continuing Professional Education
- Mrs. Stonebraker participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.

Commitment to Quality Service

Personnel Qualifications and Experience

Jonathan Herman, CPA
Senior Staff Accountant – 7 years

Education
- University of Central Florida, B.S. – Accounting
- Florida Atlantic University, MACC

Professional Experience
- Accounting graduate with five years experience with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

Continuing Professional Education
- Mr. Herman participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.

Personnel Qualifications and Experience

Sean Stanton, CPA
Staff Accountant – 4 years

Education
- University of South Florida, B.S. – Accounting
- Florida Atlantic University, M.B.A. – Accounting

Professional Experience
- Staff accountant with Berger, Toombs, Elam, Gaines, & Frank auditing governmental and non-profit entities.

Continuing Professional Education
- Mr. Stanton participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.

Personnel Qualifications and Experience

Taylor Nuccio
Staff Accountant – 3 years

Education
- Indian River State College, B.S.A. – Accounting

Professional Experience
- Staff Accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

Continuing Professional Education
- Ms. Nuccio participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.
- Ms. Nuccio is currently working towards completing an additional 30 hours of education to qualify to sit for CPA exam.

Personnel Qualifications and Experience

Tifanee Terrell
Staff Accountant

Education
- Florida Atlantic University, M.B.A. – Accounting

Professional Experience
- Staff Accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

Continuing Professional Education
- Ms. Terrell participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.
- Ms. Terrell is currently working towards completing an additional 30 hours of education to qualify to sit for CPA exam.

Personnel Qualifications and Experience

Arturo Ortiz
Staff Accountant

Education
- Indian River State College, B.S.A. – Accounting

Professional Experience
- Staff Accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

Continuing Professional Education
- Mr. Ortiz participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.
- Mr. Ortiz is currently working towards completing an additional 30 hours of education to qualify to sit for CPA exam.

Personnel Qualifications and Experience

Mathew Spinosa
Staff Accountant

Education
- Indian River State College, B.S.A. – Accounting

Professional Experience
- Staff Accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

Continuing Professional Education
- Mr. Spinosa participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.
- Mr. Spinosa is currently working towards completing an additional 30 hours of education to qualify to sit for CPA exam.

Personnel Qualifications and Experience

Dylan Dixon
Staff Accountant

Education
- Indian River State College, A.A. – Accounting

Professional Experience
- Staff Accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

Continuing Professional Education
- Mr. Dixon is currently pursuing a bachelor's degree in Accounting.
- Mr. Dixon participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.
- Mr. Dixon is currently working towards completing an additional 30 hours of education to qualify to sit for CPA exam.

BAGGETT
REUTIMANN
& ASSOCIATES, CPAS, PA

Judson B. Baggett
MBA, CPA, CVA, Partner
Marci Reutimann
CPA, Partner

6815 Dairy Road
Zephyrhills, FL 33542
(813) 788-2155
(813) 782-8606

Report on the Firm's System of Quality Control

To the Partners
Berger, Toombs, Elam, Gaines & Frank, CPAs, PL
and the Peer Review Committee of the Florida Institute of Certified Public Accountants

October 30, 2019

We have reviewed the system of quality control for the accounting and auditing practice of Berger, Toombs, Elam, Gaines & Frank, CPAs, PL, (the firm), in effect for the year ended May 31, 2019. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants (Standards).

A summary of the nature, objectives, scope, limitations of, and the procedures performed in a System Review as described in the Standards may be found at aicpa.org/prsummary. The summary also includes an explanation of how engagements identified as not performed or reported in conformity with applicable professional standards, if any, are evaluated by a peer reviewer to determine a peer review rating.

Firm's Responsibility

The firm is responsible for designing a system of quality control and complying with it to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. The firm is also responsible for evaluating actions to promptly remediate engagements deemed as not performed or reported in conformity with professional standards, when appropriate, and for remediating weaknesses in its system of quality control, if any.

Peer Reviewer's Responsibility

Our responsibility is to express an opinion on the design of the system of quality control, and the firm's compliance therewith based on our review.

Required Selections and Considerations

Engagements selected for review included engagements performed under *Government Auditing Standards*, including a compliance audit under the Single Audit Act.

As a part of our peer review, we considered reviews by regulatory entities as communicated by the firm, if applicable, in determining the nature and extent of our procedures.

Opinion

In our opinion, the system of quality control for the accounting and auditing practice of Berger, Toombs, Elam, Gaines & Frank, CPAs, PL, in effect for the year ended May 31, 2019, has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of *pass, pass with deficiency(ies)*, or *fail*. Berger, Toombs, Elam, Gaines & Frank, CPAs, PL has received a peer review rating of *pass*.

Baggett, Reutimann & Associates, CPAs PA
BAGGETT, REUTIMANN & ASSOCIATES, CPAs, PA

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS

Annual Auditing Services for Fiscal Year 2021
Clay County, Florida

INSTRUCTIONS TO PROPOSERS

SECTION 1. DUE DATE. Sealed proposals must be received no later than October 15, 2021, at 12:00 p.m., at the offices of District Manager, located at 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431. Proposals will be publicly opened at that time.

SECTION 2. FAMILIARITY WITH THE LAW. By submitting a proposal, the Proposer is assumed to be familiar with all federal, state, and local laws, ordinances, rules and regulations that in any manner affect the work. Ignorance on the part of the Proposer will in no way relieve it from responsibility to perform the work covered by the proposal in compliance with all such laws, ordinances and regulations.

SECTION 3. QUALIFICATIONS OF PROPOSER. The contract, if awarded, will only be awarded to a responsible Proposer who is qualified by experience and licensing to do the work specified herein. The Proposer shall submit with its proposal satisfactory evidence of experience in similar work and show that it is fully prepared to complete the work to the satisfaction of the District.

SECTION 4. SUBMISSION OF ONLY ONE PROPOSAL. Proposers shall be disqualified and their proposals rejected if the District has reason to believe that collusion may exist among the Proposers, the Proposer has defaulted on any previous contract or is in arrears on any previous or existing contract, or for failure to demonstrate proper licensure and business organization.

SECTION 5. SUBMISSION OF PROPOSAL. Submit one (1) electronic copy and one (1) unbound copy of the Proposal Documents, and other requested attachments at the time and place indicated herein, which shall be enclosed in an opaque sealed envelope, marked with the title “Auditing Services – Creekview Community Development District” on the face of it. Please include pricing for each additional bond issuance.

SECTION 6. MODIFICATION AND WITHDRAWAL. Proposals may be modified or withdrawn by an appropriate document duly executed and delivered to the place where proposals are to be submitted at any time prior to the time and date the proposals are due. No proposal may be withdrawn after opening for a period of ninety (90) days.

SECTION 7. PROPOSAL DOCUMENTS. The proposal documents shall consist of the notice announcing the request for proposals, these instructions, the Evaluation Criteria Sheet and a proposal with all required documentation pursuant to Section 12 of these instructions (“Proposal Documents”).

SECTION 8. PROPOSAL. In making its proposal, each Proposer represents that it has read and understands the Proposal Documents and that the proposal is made in accordance therewith.

SECTION 9. BASIS OF AWARD/RIGHT TO REJECT. The District reserves the right to reject any and all proposals, make modifications to the work, and waive any informalities or irregularities in proposals as it is deemed in the best interests of the District.

SECTION 10. CONTRACT AWARD. Within fourteen (14) days of receipt of the Notice of Award from the District, the Proposer shall enter into and execute a Contract (engagement letter) with the District.

SECTION 11. LIMITATION OF LIABILITY. Nothing herein shall be construed as or constitute a waiver of the District's limited waiver of liability contained in Section 768.28, Florida Statutes, or any other statute or law.

SECTION 12. MISCELLANEOUS. All proposals shall include the following information in addition to any other requirements of the proposal documents.

A. List the position or title of all personnel to perform work on the District audit. Include resumes for each person listed; list years of experience in present position for each party listed and years of related experience.

B. Describe proposed staffing levels, including resumes with applicable certifications.

C. Three references from projects of similar size and scope. The Proposer should include information relating to the work it conducted for each reference as well as a name, address and phone number of a contact person.

D. The lump sum cost of the provision of the services under the proposal, plus the lump sum cost of four (4) annual renewals.

SECTION 13. PROTESTS. In accordance with the District's Rules of Procedure, any protest regarding the Proposal Documents, must be filed in writing, at the offices of the District Manager, within seventy-two (72) calendar hours (excluding Saturday, Sunday, and state holidays) after the receipt of the Proposal Documents. The formal protest setting forth with particularity the facts and law upon which the protest is based shall be filed within seven (7) calendar days (including Saturday, Sunday, and state holidays) after the initial notice of protest was filed. Failure to timely file a notice of protest or failure to timely file a formal written protest shall constitute a waiver of any right to object or protest with respect to the aforesaid Proposal Documents.

SECTION 14. EVALUATION OF PROPOSALS. The criteria to be used in the evaluation of proposals are presented in the Evaluation Criteria Sheet, contained within the Proposal Documents.

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT
AUDITOR SELECTION
EVALUATION CRITERIA

1. Ability of Personnel. (20 Points)

(E.g., geographic location of the firm's headquarters or permanent office in relation to the project; capabilities and experience of key personnel; present ability to manage this project; evaluation of existing work load; proposed staffing levels, etc.)

2. Proposer's Experience. (20 Points)

(E.g. past record and experience of the Proposer in similar projects; volume of work previously performed by the firm; past performance for other or current Community Development District(s) in other contracts; character, integrity, reputation of Proposer, etc.)

3. Understanding of Scope of Work. (20 Points)

Extent to which the proposal demonstrates an understanding of the District's needs for the services requested.

4. Ability to Furnish the Required Services. (20 Points)

Extent to which the proposal demonstrates the adequacy of Proposer's financial resources and stability as a business entity necessary to complete the services required.

5. Price. (20 Points)***

Points will be awarded based upon the lowest total proposal for rendering the services and the reasonableness of the proposal. Please include pricing for each additional bond issuance.

Total (100 Points)

***Alternatively, the Board may choose to evaluate firms without considering price, in which case the remaining categories would be assigned 25 points each.

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

13CII

Professional Services Proposal for

Creekview Community Development District

Oct 12, 2021

Proposer
Carr, Riggs & Ingram CPAs and Advisors
500 Grand Boulevard, Suite 210
Miramar Beach, FL 32550
Phone: 850.837.3141
Fax: 850.654.4619

Submitted by
Jonathan Hartness
Engagement Partner
JHartness@CRIcpa.com

CRI CARR RIGGS & INGRAM
CPAs and Advisors
CRIcpa.com

Dear Creekview Community Development District:

Carr, Riggs & Ingram, LLC (CRI) appreciates the opportunity to propose on auditing services to Creekview Community Development District. We are genuinely excited about the prospect of serving you and establishing a long-term relationship. We pride ourselves on getting to know our clients and illuminating solutions by providing innovative ideas to move them from compliance to providing them a competitive advantage.

Investment in You. We believe in developing long-term, mutually beneficial relationships and quickly demonstrating value with a fee structure and service solutions that provide immediate and continued savings. Our investment starts on "Day 1" as your assigned team begins with our proven, streamlined process that minimizes your time and disruption during the service provider change and continues throughout the relationship.

Dedicated Team. CRI's team consists of more than 1,900 professionals, which allows us to tailor your service team by aligning their industry, service, and specialty skills with your needs. Our dedicated teams deliver the highest level of business acumen and knowledge to your organization; our commitment to consistent staffing allows you to maximize savings and remain focused on your needs.

Equilibrium. CRI delivers big firm expertise with small firm service. Of approximately 45,000 public accounting firms in the United States, CRI currently ranks in the top 25. Additionally, as a part of PrimeGlobal, an association of independent accounting firms, we have access to international resources as – and when – needed. Leveraging these resources while maintaining local decision-making authority means that simplified solutions are only a phone call away. And we believe that's the best of both worlds for our clients.

Active Partner Participation. Collectively, our partners deliver expertise derived from more than 7,500 years of business experience. With this level of talent, we thoughtfully choose a partner that aligns with your business' needs and industry. Our hands-on, working partners "show up" to convey our genuine commitment to your success. They strive to earn trusted advisor roles by digging in, proactively learning your business, and producing long-term value for you.

Simplified Solutions. While our 500+ cumulative partner certifications is an impressive statistic, success is measured by translating complex concepts into client solutions. While accounting is the language of business, we're here to decipher the jargon and help you make educated decisions. CRInnovate embraces agility and invention.

Our CRI vSTAR™ process provides a transformational approach to client service by encompassing every service we offer in a completely virtual format. Regardless of physical location, our processes are designed to provide clients with increased efficiencies, reduced travel costs, and crisis-proofing for business functions.

We welcome the opportunity to demonstrate to you the same teamwork, expertise, innovation, and responsiveness that have made us one of the fastest growing public accounting firms in the United States. Again, we appreciate your consideration.

Sincerely,

Jonathan Hartness
Engagement Partner
Carr, Riggs & Ingram, LLC

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UNDERSTANDING & MEETING YOUR NEEDS

From the RFP or during our recent visit with your team, we understood your team to express the following needs, requests, and/or issues. We've detailed our proposed solutions below and are happy to discuss other related projects as they arise and upon request.

	NEEDS & ISSUES	SOLUTIONS & SERVICES
Technical	The District is required to have independent audits performed on its financial statements.	Perform external audit services in accordance with auditing standards generally accepted in the United States of America (GAAS), in order to express an opinion on the Creekview Community Development District's financial statements.
Relational	The District's Board of Supervisors and management expect open and continuous communication with their CPA firm in order to avoid surprise findings at the end of the audit.	Communicate contemporaneously and directly with management regarding the results of our procedures. Anticipate and respond to concerns of management and/or the Audit Committee (if/when formed).

YOUR SERVICES AND FEES

We value creating mutually rewarding, long-term relationships with our clients. Our goal is to provide high quality, responsive service that yields returns far greater than your investment in our professional fees. Please find below our proposal of fees to provide the requested services for the upcoming fiscal year, with an option for additional annual renewals, subject to mutual agreement by CRI and the District.

SERVICE	CRI FEES 2021
Perform external audit services in accordance with auditing standards generally accepted in the United States of America (GAAS)	$5,000

The above fee quote is based in part on the fact that the District has not yet issued bonds or other debt instruments to finance capital asset acquisition and construction. In the event the District issues such debt instruments or upon construction of major infrastructure additions, the audit fee will increase by an amount of $1,100 per year for each bond issuance.

If Creekview Community Development Districtrequests additional services outside of this proposal, professional fee hourly rates are as follows, but may be negotiated depending on the project request:

CLASSIFICATION	HOURLY RATE
Partner	$325
Manager	$225
Senior	$150
Staff	$110
IT Specialist	$400
Fraud Specialist	$400

Our professional fees are based on the key assumptions that Creekview Community Development District will:

- Ensure that the predecessor’s work papers will be made available for timely review.
- Make available documents and work papers for review at Creekview Community Development District's headquarters location, although we may choose to review at alternate locations.
- Prepare certain schedules and analyses and provide supporting documents as requested.
- Assist us in obtaining an understanding of the accounting systems of Creekview Community Development District.
- Not experience a significant change in business operations or financial reporting standards.

CRI FIRM PROFILE

FOUNDED IN 1997 • 10 STATES • 25+ MARKETS

1900+ PROFESSIONALS

300+ PARTNERS

TOP 25 CPA FIRM

(as ranked by Accounting Today)

100,000+ CLIENTS

in all 50 states

20+ YEARS OF CONSISTENT GROWTH SINCE FORMATION

CRI FIRM VALUES:

CLIENT SERVICE.

RESPECT.

INTEGRITY.

TAILORED CLIENT SERVICE

RESPECT FOR ALL

CRI

UNYIELDING INTEGRITY

SERVICES

Accounting & Auditing
Advisory
Business Support & Transactions
Business Tax
Employee Benefit Plans
Governance, Risk & Assurance
Individual Tax & Planning
IT Audits & Assurance

INDUSTRY EXPERTISE

Captive Insurance
Construction
Financial Institutions
Governments
Healthcare
Institutional Real Estate
Insurance
Manufacturing & Distribution
Nonprofits

CRI FAMILY OF COMPANIES

- Auditwerx
- CRI Advanced Analytics
- CRI Capital Advisors
- CRI Solutions Group
- CRI TPA Services
- Level Four Advisory Services
- Paywerx
- Preferred Legacy Trust

CRI'S GOVERNMENTAL EXPERTISE

Audit and Consulting Services for

500+ governmental entities with annual revenues totaling **$26 Billion**

230+ single audits performed annually

Consulting and other agreed upon procedures engagements for **150+** government entities

Single Audit Resource Center's Award for Excellence in Knowledge, Value, and Overall Client Satisfaction

Member of AICPA's Government Audit Quality Center

Governmental Partner Designations

Including: CPA, CGFM, CITP, CFE, CMA, CISA, CGEIT, CTGA, CFF, CGMA, and CGAP

CLIENTS WITH ANNUAL REVENUES UP TO:

80+ School Districts
$1.1 Billion

110+ Municipalities
$1.8 Billion

75+ Agencies/Authorities
$3 Billion

RELEVANT EXPERIENCE

CRI delivers a depth of resources that ensures our understanding of your challenges and innovative solutions for overcoming them. Our team's combined experience is derived from providing audit, tax, consulting, and accounting outsourcing services. We parlay this vast experience and derived best practices into proven solutions that benefit you. Below we share specific, relevant client references; we encourage you to consult with them.

RELATIONSHIP	TIMELINE	SERVICE DESCRIPTION	RELEVANT POINTS TO CONSIDER
Rizzetta & Company Shawn Wildermuth 3434 Colwell Avenue Suite 200 Tampa, FL 33614 813.933.5571	2006 – Present	Annual Financial Statement Audits of Multiple CDDs	• Client service experience • Responsiveness to client needs • Long-term relationship • CDD management co.
GMS, LLC Dave DeNagy 14785 Old St. Augustine Road Suite 4 Jacksonville, FL 32258 904.288.9130	2006 – Present	Annual Financial Statement Audits of Multiple CDDs	• Client service experience • Responsiveness to client needs • Long-term relationship • CDD management co.
Wrathell, Hunt & Associates, LLC Jeffrey Pinder 2300 Glades Road Suite 410W Boca Raton, FL 33431 561.571.0010	2006 – Present	Annual Financial Statement Audits of Multiple CDDs	• Client service experience • Responsiveness to client needs • Long-term relationship • CDD management co.
PFM Group Consulting, LLC Jennifer Glasgow 12051 Corporate Blvd. Orlando, FL 32817 407.382.3256	2007 – Present	Annual Financial Statement Audits of Multiple CDDs	• Client service experience • Responsiveness to client needs • Long-term relationship • CDD management co.

Jonathan Hartness

Engagement Partner

JHartness@CRIcpa.com
850.337.3569 | Direct

Representative Clients

- Community Development Districts
- Condominium and Homeowner Associations

Experience

Jonathan has over 12 years of auditing and accounting experience with CRI. He is responsible for audits, reviews and compilations of local governmental entities, condominium and homeowner associations, and non-public companies.

Jonathan is licensed to practice as a Certified Public Accountant in Florida. He is a member of the American Institute of Certified Public Accountants and the Florida Institute of Certified Public Accountants. He exceeds all continuing professional education requirements related to *Government Auditing Standards*.

Jonathan currently supervises engagements for many governmental entities in the State of Florida including community development districts. He is active in our firm's governmental industry line as well as our condominium and homeowner association practice. Jonathan is an integral part of our community development district practice.

Education, Licenses & Certifications

- MAcc, Accounting, University of West Florida
- Certified Public Accountant
- Community Association Manager (CAM), Licensed in Florida

Professional Affiliations

- American Institute of Certified Public Accountants (AICPA)
- Florida Institute of Certified Public Accountants (FICPA)

K. Alan Jowers

Consulting Partner

AJowers@CRIcpa.com
850.337.3213 | Direct

Representative Clients

- Santa Rosa County District School Board
- Okaloosa Gas District
- Santa Rosa Island Authority
- Pasco County
- Okaloosa County District School Board
- Pinellas County School District
- Celebration Community Development District
- Hammock Bay Community Development District
- Amelia National Community Development District

Experience

Alan has over 25 years of experience in public accounting primarily with financial statement assurance engagements. His practice includes local governmental entities, condominium and homeowner associations, non-profit organizations, and nonpublic companies. He currently has direct engagement responsibility for a significant number of audits throughout the state of Florida.

Alan is licensed to practice as a certified public accountant in Florida and Georgia. He is a member of the Board of Directors of the Florida Institute of Certified Public Accountants (FICPA), has been an active member of the FICPA's State and Local Governmental Committee, and is a past chair of its Common Interest Realty Association Committee. He is also active in the Panhandle Chapter of the Florida Governmental Finance Officers Association (FGFOA) and is a former member of the FGFOA's statewide Technical Resource Committee.

Education, Licenses & Certifications

- Masters of Accountancy, University of Alabama
- BS, Accounting, Florida State University
- Certified Public Accountant

Professional Affiliations

- American Institute of Certified Public Accountants (AICPA)
- Florida Institute of Certified Public Accountants (FICPA) - member of the Board of Governors
- Governmental Finance Officers Association (GFOA)
- Florida Governmental Finance Officers Association (FGFOA)

Grace Hartness

Senior Manager

GHartness@CRIcpa.com
850.337.3243 | Direct

Representative Clients

- Community Development Districts
- Condominium and Homeowner Associations
- Utility Services
- School Districts
- County and Local Governments
- Non-Profit Organizations

Experience

Grace has over 12 years accounting and audit experience with CRI. She has worked on several major construction companies, government entities, community development districts, condominium and homeowner associations and non-profit organizations. In addition, she has been involved in special audit projects for the Miami-Dade Airport Authority. Grace is licensed to practice as a certified public accountant in Florida and exceeds all continuing professional education requirements related to Government Auditing Standards. In addition, Grace fluently speaks several languages including French and Arabic. Grace currently supervises engagements for many special districts in the State of Florida including community development districts and school districts. She is active in our firm's condominium and homeowner association practice. Grace started with CRI in August 2006, upon completion of her master's degree, and was promoted to manager in 2011.

Education, Licenses & Certifications

- MAcc, Accounting, University of West Florida
- Certified Public Accountant
- Community Association Manager (CAM), Licensed in Florida

Professional Affiliations

- American Institute of Certified Public Accountants (AICPA)
- Florida Institute of Certified Public Accountants (FICPA)
- Accounting & Financial Women's Alliance (AFWA)

Chad Branson

Senior Manager

CBranson@CRIcpa.com
850.337.3226 | Direct

Representative Service Areas

- Local Governments including Water and Sewer Organizations and Fire Districts
- School Districts including Foundations
- Nonprofit Organizations

Representative Clients (including previous clients)

- School Districts - Pinellas County, Okaloosa County, Pasco County, Santa Rosa County
- Florida Office of Early Learning Coalition
- Florida Department of Elder Affairs
- Fire Districts -Destin, Ocean City, North Bay
- Utilities - Regional Utilities,Midway Water Systems, Inc.,Emerald Coast Utilities Authority
- Escambia County

Experience

Chad Branson has over 17 years of experience in public accounting, with practice concentrations in auditing governmental, nonprofit and for profit entities. Chad has accumulated experience throughout his career in Federal and Florida Single Audit Acts compliance monitoring and auditing. During his career he has supervised and managed audit engagements for a wide variety of governmental and nonprofit organization clients.In addition, he has performed internal audit work, information technology general controls testing, forensic investigations, and risk assessments for governmental entities.

Chad has been with Carr, Riggs and Ingram, LLC since 2005.

Education, Licenses & Certifications

- Bachelor and Master of Accountancy – University of Mississippi, Oxford MS
- Certified Public Accountant (CPA) – Licensed in Florida and Mississippi
- Community Association Manager (CAM) – Florida
- Certified Information Technology Professional – AICPA

Professional Affiliations

- American Institute of Certified Public Accountants (AICPA)
- Florida Institute of Certified Public Accountants (FICPA)
- Emerald Coast Chapter (FICPA) Board
- Florida Governmental Finance Officers Association (FGFOA)

Lauren Villarreal

Supervising Senior

LVillarreal@CRIcpa.com
850.337.3223 | Direct

Representative Service Areas

- Community Development Districts
- Condominium and Homeowner Associations
- Employee Benefit Plans
- County and Local Governments
- Non-Profit Organizations

Experience

Lauren has four years auditing and accounting experience in the Destin office of CRI. She is an audit supervising senior with primary responsibility for fieldwork and reporting on audits of clients in a variety of industries including local governmental and non-profit entities as well as employee benefit plans and commercial businesses. She is currently the in-charge auditor for over a dozen community development districts with several CDD management companies in the State of Florida.

Lauren is licensed to practice as a Certified Public Accountant in Florida. She is a member of the American Institute of Certified Public Accountants and the Florida Institute of Certified Public Accountants. She exceeds all continuing professional education requirements related to *Government Auditing Standards*.

Lauren currently supervises engagements for many governmental entities in the State of Florida including community development districts and other special governments. She is active in our firm's governmental industry line as well as the condominium and homeowner association practice. In addition, Lauren has accumulated experience in Federal and Florida Single Audit Acts compliance monitoring and auditing. Lauren has performed several single audits of federal grants under OMB Circular A-133.

Education, Licenses & Certifications

- BS, Accounting, Florida State University
- BS, Business Administration, Florida State University
- Certified Public Accountant
- Community Association Manager (CAM), Licensed in Florida

Professional Affiliations

- American Institute of Certified Public Accountants (AICPA)
- Florida Institute of Certified Public Accountants (FICPA)

DELIVERING QUALITY TO YOU

AUDIT METHODOLOGY

Our audit, tax, consulting, and client accounting services documentation is maintained electronically. Compliance with our methodology is regularly reviewed and evaluated as part of our internal quality program, which is further discussed in this section under **INTERNAL QUALITY CONTROL REVIEWS AND EXTERNAL REVIEWS**. Comprehensive policies and procedures governing all of our practices and addressing professional and regulatory standards and implementation issues are constantly updated for new professional developments and emerging issues. See the table of contents to identify the relevant audit approach and methodology detailed description section.

ENGAGEMENT QUALITY REVIEW PARTNER (CONCURRING PARTNER)

Audit engagements are assigned engagement quality review (EQR) partner, as appropriate. This role is one of the most important elements of our quality assurance process, as it provides for a timely, independent review of key accounting and auditing issues. The EQR partner also reviews the financial statements and related supporting documentation—including the disclosures—to evaluate their fair presentation under accounting principles generally accepted in the United States of America (GAAP).

INTERNAL QUALITY CONTROL REVIEWS AND EXTERNAL REVIEWS

Experienced partners and professional staff of our firm conduct quality control reviews of our audits. Our partners' work is reviewed annually, and the inspection process includes periodic testing of the effectiveness of our quality controls and a continuous improvement program. This risk-based annual inspection is intended to mimic the triennial peer review described in the following paragraph and are performed on completed engagements. In addition to this inspection, we perform in-process, "pre-issuance" reviews of partners' work that are chosen for using a risk-based selection process; these reviews are performed by our corporate quality control team. The combination of the in-process and completed engagements is part of our continuous improvement processes.

Peer reviews are performed every three years by another independent public accounting firm. The most recent review of our firm was performed in 2019 by Brown Edwards, whose report was the most favorable possible "Pass".

In addition, we are registered with the PCAOB and our 2018 PCAOB inspection report was also the most favorable possible—no audit deficiencies or quality control defects identified. The 2018 PCAOB report can be viewed at:
https://pcaobus.org/Inspections/Reports/Documents/104-2019-029-Carr-Riggs-Ingram-LLC.pdf.

SHARING CRI'S VALUES WITH YOU

We are proud of our hands-on, service-centric, and results-oriented approach. Combining that approach with quality controls and superior talent allows us to help you achieve your goals and strengthen your management systems and processes. This approach is further emphasized through our three core values which guide our team's behavior and function as the foundation for interactions with our clients and each other.

CLIENT SERVICE

Defining our brand by meeting or exceeding the highest expectations of our clients

RESPECT

Building productive, long-term relationships with each other that are based on mutual respect, trust, and sharing

INTEGRITY

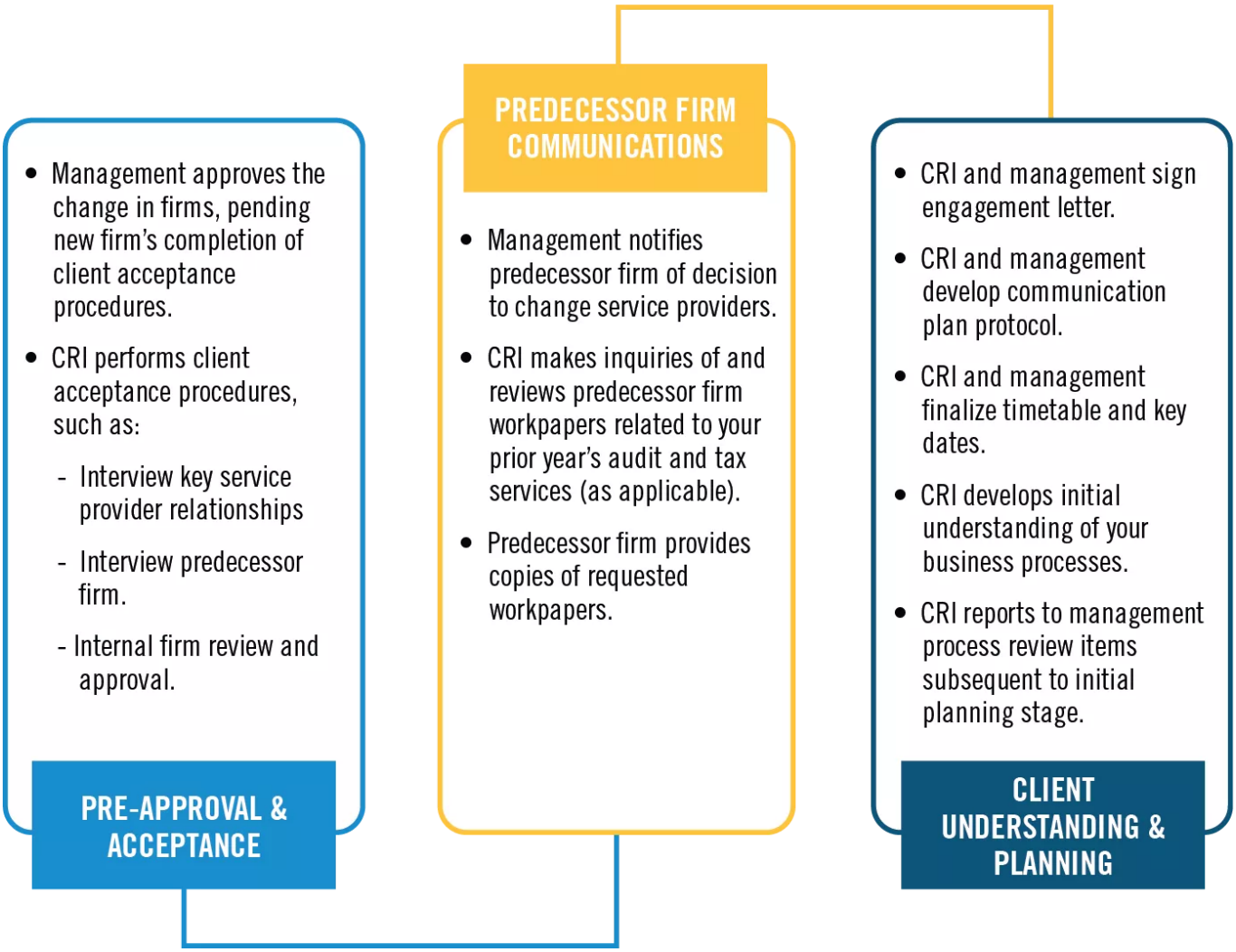
Living with sincerity, transparency, and honesty

TRANSITIONING YOU

When choosing to change firms, the time involved in working with new accounting professionals is often a concern. CRI's well-defined efficient, seamless transition process is designed to:

- Provide you with value from the very first encounter,
- Avoid interruption of service,
- Minimize disruption and investment of management's time,
- Raise the standard of service, and
- Establish ongoing channels of communication with Creekview Community Development District's management.

The transition plan is comprised of the following key activities and can occur within approximately two weeks, depending on the availability of the parties involved:



CRI'S GLOBAL RESOURCES

Many businesses are expanding and/or evaluating their global reach, and they require assistance in order to comprehensively consider the various financial implications of growing in international markets. In addition to CRI's internal resources, we deliver the expertise and support of some of the world's most highly regarded accounting firms through shared alliance as members of PrimeGlobal.

WHO IS PRIMEGLOBAL?

PrimeGlobal

An Association of Independent Accounting Firms

Revenue	Countries	Locations	Staff	Partners	Firms
$2.9B+	90+	850+	24,000+	2,100+	300+

HOW OUR PRIMEGLOBAL MEMBERS CAN BENEFIT YOU

We supplement our in-depth, industry knowledge and specialized services through our collaborations with other PrimeGlobal firms to help you evaluate your options globally. CRI's goal is to provide you with the information you need to make well-informed, smart business decisions.

4 KEY BENEFITS TO CRI CLIENTS FROM OUR PRIMEGLOBAL MEMBERSHIP

1 SOLUTIONS
that are worldwide and world-class.

2 ACCESSIBILITY
to knowledge and resources of statutory, regulatory, and compliance requirements throughout the world.

3 DECISION MAKING
with the support of local connections and cultural understanding throughout regions of the world.

4 SINGLE POINT OF CONTACT
CRI's team serves as your contact for each engagement, and we project manage across the entire team - including other PrimeGlobal firms and specialists.

JOIN OUR CONVERSATION

We know that some information that makes perfect sense to a CPA may not be as clear to our clients. Therefore, we produce original content in the form of articles, videos, white papers, webinars, and more to provide timely, down-to-earth translations of complex subjects. We publish this original content on **CRIcpa.com** and across all our many social channels.

FOLLOW CRI ON SOCIAL MEDIA @CRICPA

SUBSCRIBE TO THE CRI E-NEWSLETTER

CRICPA.COM/NEWSLETTER-SIGNUP

IT FIGURES: THE CRI PODCAST

Created to provide insight into the latest developments and regulations in the accounting and finance space, It Figures is an accounting and advisory focused podcast for business and organization leaders, entrepreneurs, and anyone who is looking to go beyond the status quo.

Listen on Apple Podcasts, Spotify, iHeart Radio, and more.
itfiguretspodcast.com

CRI'S CEO ACTION FOR DIVERSITY AND INCLUSION

Carr, Riggs & Ingram is committed to fostering an inclusive and diverse place for all employees to work in and engage. When our managing partner and chairman, Bill Carr, signed the CEO Action for Diversity & Inclusion™ pledge, he made a public commitment to building a productive, diverse, and inclusive workplace. **Learn more about CRI's commitment to Diversity and Inclusion.**

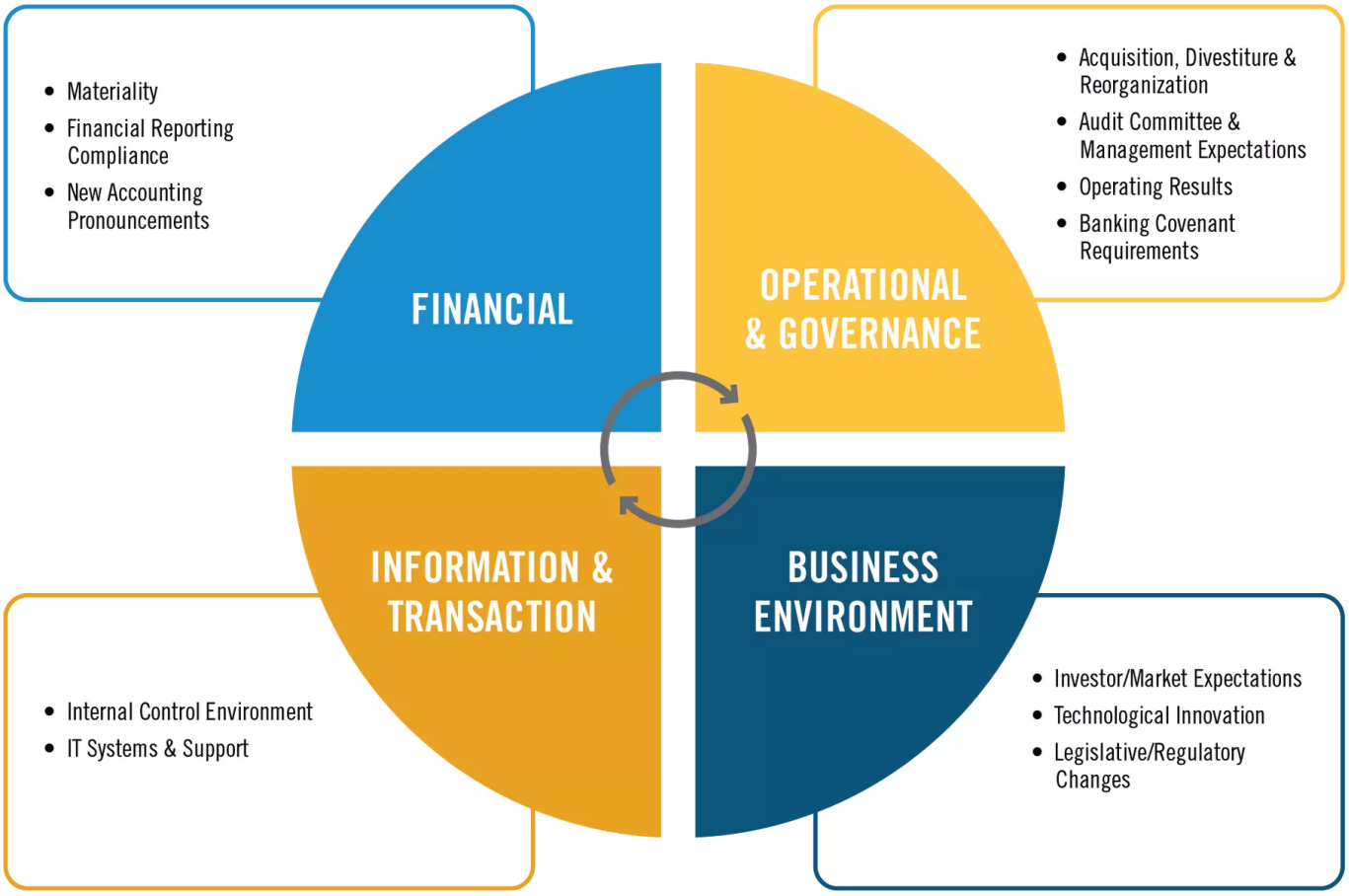
CRI AUDIT FRAMEWORK

Our proposed services require a coordinated effort between us and Creekview Community Development District's team. Planning and continual communication are essential to developing the appropriate procedures, working collaboratively to resolve any identified issues, and meeting your timelines.

CRI's audit approach occurs within a framework of our client's business and industry; therefore, we assess risk by:

- Understanding management's perspectives and goals, and
- Considering business conditions and threats that could prevent management from achieving its business objectives.

We assess risks in the following areas:



CRI AUDIT FRAMEWORK

Our ultimate intent is to drill down from these broad risks to specific financial reporting risks. We understand both these risks and management's processes and procedures for mitigating them (i.e. internal controls) in order to develop our procedures to carry out our audit responsibilities.

Although our audits are conducted through a structured, risk-based model, we focus on understanding the client's needs, requirements, and expectations. We work collaboratively with management and the Audit Committee (or similar function) to develop a communication and work plan to continuously improve client service, by doing so we help in moving your team from simple compliance to providing you with a competitive advantage.

In planning, we concentrate on "key risks," (items with a greater risk of a material misstatement, a material weakness in internal controls, or other matters resulting in the issuance of an inappropriate audit report). We focus on "material" items (i.e. those items that would be important to the user of your financial statements). When evaluating materiality of identified misstatements, certain quantitative and qualitative factors must be considered—which may include:

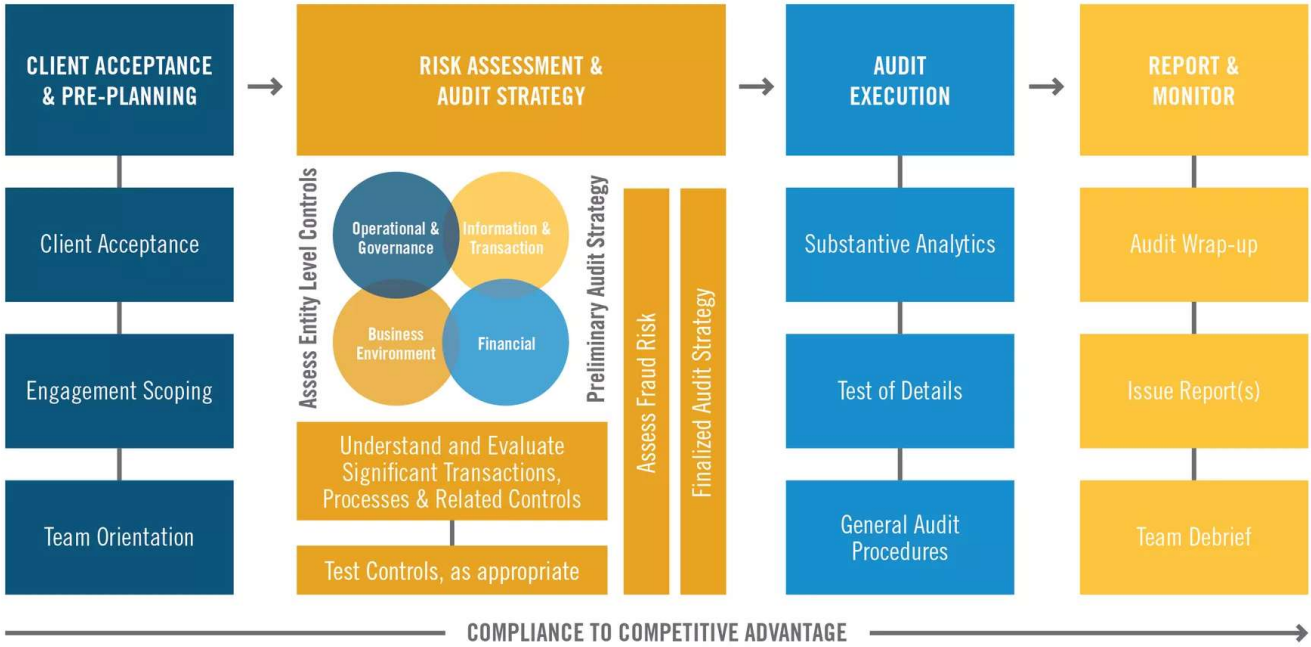
- Impact on operating trends (revenue/income, expenses, net income, etc).
- Nature of the misstatement (i.e., did the misstatement result from an unlawful transaction?).
- Impact on liquidity, capital/surplus, earnings capacity, etc.
- Impact to loan covenants and contractual and regulatory requirements.

Consistent communication is a key to completion of the audit. By ensuring constant involvement, we are in a better position to respond to your issues timely and efficiently. Therefore, we plan to meet with your management to:

- Set-up the audit by reviewing the mapping of Creekview Community Development District's financial information (financial statements and notes) to significant processes and IT systems to ensure that all significant account balances, transactions, procedures, and systems are tested as deemed necessary.
- Discuss ongoing changes—specifically new accounting pronouncements and key business transactions in their early stages, enabling us to agree on the resolution of various complex business issues on a timely basis.

CRI AUDIT APPROACH

Our audit approach is a four stage approach, as depicted in the summary below. Our client acceptance and risk assessment procedures occur during detailed conversations and observations with your team. The results of those procedures allow us to tailor an audit program to your specific risks and needs. We then execute the audit, report the results, and evaluate continuous improvement opportunities for ongoing service and benefit to you.



CRI AUDIT APPROACH

STAGE 1: CLIENT ACCEPTANCE & PRE-PLANNING

- Perform client acceptance procedures.
- Collaborate with management to agree to expectations and scope.
- Assign appropriate staff based on client needs and assessed risk.

STAGE 2: RISK ASSESSMENT & AUDIT STRATEGY

- Interview client personnel and others to understand client-specific objectives and risks.
- Assess following aspects of the organization for their impact on the audit plan:
  - environmental and other external risks,
  - management's fraud and IT risk assessment models,
  - entity level controls including:
    - control environment
    - risk assessment,
    - information and communication,
    - and monitoring controls.
  - IT General Computer (ITGC) controls, such as
    - IT Environment
    - Developing and Delivering IT, and
    - Operating and Monitoring IT.
- Determine materiality.
- Develop and document our understanding of and/or reliance on:
  - linkage of financial statements to:
    - significant transactions,
    - processes,
    - IT systems, and
    - related controls,
  - existence of/reliance on SOC entities and their reports,
  - internal audit, and
  - specialists (e.g. valuation, pension costs, etc.).
- If elected, test controls including ITGC, through a mix of:
  - inquiry,
  - observation
  - examination, and
  - re-performance.
- Perform preliminary analytical procedures.
- Finalize risk assessments and develop a final audit strategy.

STAGE 3: AUDIT EXECUTION

- Where possible to test as efficiently as possible:
  - develop detailed analytical procedures to use as substantive tests (benefit = reducing tests of details): Examples include:
    - ratio analysis,
    - regression analysis,
    - trend analysis,
    - predictive tests, or
    - reasonableness test,
  - utilize Computer-Assisted Audit Techniques (CAATs) (benefit = automation of testing for more coverage and less disruption to the client), and
  - perform targeted testing (also known as "coverage" testing) to test large portions of account balances (benefit = more coverage with smaller selections).
- Perform tests of details, including sampling.
- Perform general audit procedures such as tests related to:
  - commitments and contingencies,
  - legal letters,
  - management representations,
  - reviews of Board minutes,
  - related party transactions,
  - debt covenants, and
  - going concern.
- Perform other tests for compliance such as Yellow Book or Single Audit tests.

STAGE 4: REPORT & MONITOR

- Continually monitor throughout the audit - providing feedback as agreed during scoping.
- Conclude the audit (i.e. issue opinions and reports).
- Develop and present:
  - reports,
  - required communications,
  - management letter comments, and
  - other audit-related deliverables.
- Perform debriefings to identify opportunities for improvement with our:
  - engagement team, and/or
  - client's team.

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS FOR ANNUAL AUDIT SERVICES

The Creekview Community Development District hereby requests proposals for annual financial auditing services. The proposal must provide for the auditing of the District's financial records for the fiscal year ending September 30, 2021, with an option for with an option for additional annual renewals, subject to mutual agreement by both parties. The District is a local unit of special-purpose government created under Chapter 190, *Florida Statutes*, for the purpose of financing, constructing, and maintaining public infrastructure. The District is located in Leesburg, Florida. The final contract will require that, among other things, the audit for the fiscal year ending September 30, 2021, be completed no later than June 30, 2022.

The auditing entity submitting a proposal must be duly licensed under Chapter 473, *Florida Statutes*, and be qualified to conduct audits in accordance with "Government Auditing Standards," as adopted by the Florida Board of Accountancy. Audits shall be conducted in accordance with Florida Law and particularly Section 218.39, *Florida Statutes*, and the rules of the Florida Auditor General.

Proposal packages, which include evaluation criteria and instructions to proposers, are available from the District Manager at the address and telephone number listed below.

Proposers must provide one (1) electronic copy and one (1) unbound copy of their proposal to the offices of the District Manager, located at 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431 ("**District Manager**"), in an envelope marked on the outside "Auditing Services, Creekview Community Development District." Proposals must be received by 12:00 p.m., on October 15, 2021, at the office of the District Manager. Please direct all questions regarding this Notice to the District Manager.

District Manager

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

REQUEST FOR PROPOSALS
Annual Auditing Services for Fiscal Year 2021
Clay County, Florida

INSTRUCTIONS TO PROPOSERS

SECTION 1. DUE DATE. Sealed proposals must be received no later than **October 15, 2021**, at 12:00 p.m., at the offices of District Manager, located at 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431. Proposals will be publicly opened at that time.

SECTION 2. FAMILIARITY WITH THE LAW. By submitting a proposal, the Proposer is assumed to be familiar with all federal, state, and local laws, ordinances, rules and regulations that in any manner affect the work. Ignorance on the part of the Proposer will in no way relieve it from responsibility to perform the work covered by the proposal in compliance with all such laws, ordinances and regulations.

SECTION 3. QUALIFICATIONS OF PROPOSER. The contract, if awarded, will only be awarded to a responsible Proposer who is qualified by experience and licensing to do the work specified herein. The Proposer shall submit with its proposal satisfactory evidence of experience in similar work and show that it is fully prepared to complete the work to the satisfaction of the District.

SECTION 4. SUBMISSION OF ONLY ONE PROPOSAL. Proposers shall be disqualified and their proposals rejected if the District has reason to believe that collusion may exist among the Proposers, the Proposer has defaulted on any previous contract or is in arrears on any previous or existing contract, or for failure to demonstrate proper licensure and business organization.

SECTION 5. SUBMISSION OF PROPOSAL. Submit one (1) electronic copy and one (1) unbound copy of the Proposal Documents, and other requested attachments at the time and place indicated herein, which shall be enclosed in an opaque sealed envelope, marked with the title "Auditing Services – Creekview Community Development District" on the face of it. **Please include pricing for each additional bond issuance.**

SECTION 6. MODIFICATION AND WITHDRAWAL. Proposals may be modified or withdrawn by an appropriate document duly executed and delivered to the place where proposals are to be submitted at any time prior to the time and date the proposals are due. No proposal may be withdrawn after opening for a period of ninety (90) days.

SECTION 7. PROPOSAL DOCUMENTS. The proposal documents shall consist of the notice announcing the request for proposals, these instructions, the Evaluation Criteria

Sheet and a proposal with all required documentation pursuant to Section 12 of these instructions ("**Proposal Documents**").

SECTION 8. PROPOSAL. In making its proposal, each Proposer represents that it has read and understands the Proposal Documents and that the proposal is made in accordance therewith.

SECTION 9. BASIS OF AWARD/RIGHT TO REJECT. The District reserves the right to reject any and all proposals, make modifications to the work, and waive any informalities or irregularities in proposals as it is deemed in the best interests of the District.

SECTION 10. CONTRACT AWARD. Within fourteen (14) days of receipt of the Notice of Award from the District, the Proposer shall enter into and execute a Contract (engagement letter) with the District.

SECTION 11. LIMITATION OF LIABILITY. Nothing herein shall be construed as or constitute a waiver of the District's limited waiver of liability contained in Section 768.28, *Florida Statutes*, or any other statute or law.

SECTION 12. MISCELLANEOUS. All proposals shall include the following information in addition to any other requirements of the proposal documents.

A. List the position or title of all personnel to perform work on the District audit. Include resumes for each person listed; list years of experience in present position for each party listed and years of related experience.

B. Describe proposed staffing levels, including resumes with applicable certifications.

C. Three references from projects of similar size and scope. The Proposer should include information relating to the work it conducted for each reference as well as a name, address and phone number of a contact person.

D. The lump sum cost of the provision of the services under the proposal, plus the lump sum cost of four (4) annual renewals.

SECTION 13. PROTESTS. In accordance with the District's Rules of Procedure, any protest regarding the Proposal Documents, must be filed in writing, at the offices of the District Manager, within seventy-two (72) calendar hours (excluding Saturday, Sunday, and state holidays) after the receipt of the Proposal Documents. The formal protest setting forth with particularity the facts and law upon which the protest is based shall be filed within seven (7) calendar days (including Saturday, Sunday, and state holidays) after the initial notice of protest was filed. Failure to timely file a notice of protest or failure to

timely file a formal written protest shall constitute a waiver of any right to object or protest with respect to the aforesaid Proposal Documents.

SECTION 14. EVALUATION OF PROPOSALS. The criteria to be used in the evaluation of proposals are presented in the Evaluation Criteria Sheet, contained within the Proposal Documents.

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT
AUDITOR SELECTION
EVALUATION CRITERIA

1. Ability of Personnel. **(20 Points)**

(E.g., geographic location of the firm's headquarters or permanent office in relation to the project; capabilities and experience of key personnel; present ability to manage this project; evaluation of existing work load; proposed staffing levels, etc.)

2. Proposer's Experience. **(20 Points)**

(E.g. past record and experience of the Proposer in similar projects; volume of work previously performed by the firm; past performance for other or current Community Development District(s) in other contracts; character, integrity, reputation of Proposer, etc.)

3. *Understanding of Scope of Work.* **(20 Points)**

Extent to which the proposal demonstrates an understanding of the District's needs for the services requested.

4. Ability to Furnish the Required Services. **(20 Points)**

Extent to which the proposal demonstrates the adequacy of Proposer's financial resources and stability as a business entity necessary to complete the services required.

5. Price. **(20 Points)*****

Points will be awarded based upon the lowest total proposal for rendering the services and the reasonableness of the proposal. **Please include pricing for each additional bond issuance.**

Total **(100 Points)**

***Alternatively, the Board may choose to evaluate firms without considering price, in which case the remaining categories would be assigned 25 points each.

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

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CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

AUDITOR EVALUATION MATRIX

RFP FOR ANNUAL AUDIT SERVICES	ABILITY OF PERSONNEL	PROPOSER'S EXPERIENCE	UNDERSTANDING OF SCOPE OF WORK	ABILITY TO FURNISH REQUIRED SERVICES	PRICE	TOTAL POINTS
PROPOSER	20 POINTS	20 POINTS	20 POINTS	20 POINTS	20 POINTS	100 POINTS
Berger, Toombs, Elam, Gaines & Frank						
Carr, Riggs & Ingram, LLC						

NOTES:

Completed by: _____ Date: _____

Board Member's Signature

_____

Printed Name of Board Member

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

14

RESOLUTION 2022-09

A RESOLUTION BY THE BOARD OF SUPERVISORS OF THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT DESIGNATING THE PRIMARY ADMINISTRATIVE OFFICE AND PRINCIPAL HEADQUARTERS OF THE DISTRICT AND PROVIDING AN EFFECTIVE DATE.

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

WHEREAS, the District desires to designate its primary administrative office as the location where the District's public records are routinely created, sent, received, maintained, and requested, for the purposes of prominently posting the contact information of the District's Record's Custodian in order to provide citizens with the ability to access the District's records and ensure that the public is informed of the activities of the District in accordance with Chapter 119, *Florida Statutes*; and

WHEREAS, the District additionally desires to specify the location of the District's principal headquarters for the purpose of establishing proper venue under the common law home venue privilege applicable to the District.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT:

SECTION 1. The District's primary administrative office for purposes of Chapter 119, *Florida Statutes*, shall be located at Wrathell, Hunt & Associates, LLC, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431.

SECTION 2. The District's principal headquarters for purposes of establishing proper venue shall be located at _____ within Clay County, Florida.

SECTION 3. This Resolution shall take effect immediately upon adoption.

PASSED AND ADOPTED this __ day of _____, 2021.

ATTEST:

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

_____
Secretary/Assistant Secretary

_____
Chair/Vice Chair, Board of Supervisors

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

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CREEKVIEW
COMMUNITY DEVELOPMENT DISTRICT
FINANCIAL STATEMENTS
UNAUDITED
SEPTEMBER 30, 2021

CREEKVIEW
COMMUNITY DEVELOPMENT DISTRICT
BALANCE SHEET
GOVERNMENTAL FUNDS
SEPTEMBER 30, 2021

	General Fund	Debt Service Fund	Total Governmental Funds
ASSETS			
Due from Landowner	$ 25,541	$ 9,342	$ 34,883
Total assets	$ 25,541	$ 9,342	$ 34,883
LIABILITIES AND FUND BALANCES			
Liabilities:			
Accounts payable	$ 18,895	$ 9,342	$ 28,237
Due to Landowner	-	9,342	9,342
Accrued wages payable	600	-	600
Tax payable	46	-	46
Landowner advance	6,000	-	6,000
Total liabilities	25,541	18,684	44,225
DEFERRED INFLOWS OF RESOURCES			
Deferred receipts	19,541	-	19,541
Total deferred inflows of resources	19,541	-	19,541
Fund balances:			
Restricted for:			
Debt service	-	(9,342)	(9,342)
Unassigned	(19,541)	-	(19,541)
Total fund balances	(19,541)	(9,342)	(28,883)
Total liabilities, deferred inflows of resources and fund balances	$ 25,541	$ 9,342	$ 34,883

CREEKVIEW
COMMUNITY DEVELOPMENT DISTRICT
GENERAL FUND
STATEMENT OF REVENUES, EXPENDITURES,
AND CHANGES IN FUND BALANCES
FOR THE PERIOD ENDED SEPTEMBER 30, 2021

	Current Month	Year to Date	Budget	% of Budget
REVENUES				
Landowner contribution	$ -	$ -	$ 48,281	0%
Total revenues	-	-	48,281	0%
EXPENDITURES				
Professional & administrative				
Supervisors	-	646	2,000	32%
Management/accounting/recording	3,750	7,500	7,500	100%
Legal	9,369	9,369	25,000	37%
Engineering	-	-	1,500	0%
Telephone	16	33	33	100%
Postage	-	-	350	0%
Printing & binding	42	83	83	100%
Legal advertising	1,822	1,910	6,500	29%
Annual special district fee	-	-	175	0%
Insurance	-	-	2,750	0%
Contingencies/bank charges	-	-	500	
Website hosting & maintenance	-	-	1,680	0%
Website ADA compliance	-	-	210	0%
Total professional & administrative	14,999	19,541	48,281	40%
Excess/(deficiency) of revenues over/(under) expenditures	(14,999)	(19,541)	-	
Fund balances - beginning	(4,542)	-	-	
Fund balances - ending	$ (19,541)	$ (19,541)	$ -	

CREEKVIEW
COMMUNITY DEVELOPMENT DISTRICT
STATEMENT OF REVENUES, EXPENDITURES,
AND CHANGES IN FUND BALANCES
DEBT SERVICE FUND
FOR THE PERIOD ENDED SEPTEMBER 30, 2021

	Current Month	Year To Date
REVENUES	$ -	$ -
Total revenues	-	-
EXPENDITURES		
Debt service		
Cost of issuance	9,342	9,342
Total debt service	9,342	9,342
Excess/(deficiency) of revenues over/(under) expenditures	(9,342)	(9,342)
Fund balances - beginning	-	-
Fund balances - ending	$ (9,342)	$ (9,342)

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

16A

DRAFT

MINUTES OF MEETING
CREEKVIEW
COMMUNITY DEVELOPMENT DISTRICT

An Organizational Meeting of the Creekview Community Development District was held on August 27, 2021, at 10:00 a.m., at the offices of Carlton Construction, Inc., 4615 U.S. Highway 17, Suite 1, Fleming Island, Florida 32003.

Present at the meeting were:

Liam O'Reilly	Chair
Allen Skinner	Vice Chair
Richard Skinner (via telephone)	Assistant Secretary
Gregg Kern	Assistant Secretary

Also present were:

Craig Wrathell	District Manager
Kristen Suit	Wrathell, Hunt and Associates, LLC (WHA)
Jennifer Kilinski	District Counsel
Scott Wild	District Engineer
Joe Cornelius	GreenPointe Developers, LLC

FIRST ORDER OF BUSINESS **Call to Order/Roll Call**

Mr. Wrathell called the meeting to order at 10:07 a.m. The five initial Board Members named on the petition to create the CDD were Mr. Allen Skinner, Mr. Richard Skinner, Mr. Blake Weatherly, Mr. Greg Kern and Mr. Liam O'Reilly. Discussion ensued regarding the Landowners' meeting, Bradley Creek holdings and Bradley Creek, LLC.

Mr. Wrathell stated Mr. Allen Skinner, Mr. Kern and Mr. O'Reilly were present, in person. Mr. Richard Skinner was attending via telephone. Mr. Weatherly was not present.

SECOND ORDER OF BUSINESS **Public Comments**

There were no public comments.

GENERAL DISTRICT ITEMS

THIRD ORDER OF BUSINESS **Administration of Oath of Office to Initial Board of Supervisors *(the following will also be provided in a separate package)***

The Board Members chose to receive compensation for attendance at meetings.

Mr. Wrathell, a Notary of the State of Florida and duly authorized, administered the Oath of Office to Mr. Allen Skinner, Mr. Kern, and Mr. O'Reilly. The Oath of Office would be administered to Mr. Richard Skinner at the next meeting. Mr. Wrathell provided and briefly explained the following items:

A. Guide to Sunshine Amendment and Code of Ethics for Public Officers and Employees

B. Membership, Obligations and Responsibilities

C. Chapter 190, Florida Statutes

D. Financial Disclosure Forms

- **I. Form 1: Statement of Financial Interests**
- **II. Form 1X: Amendment to Form 1, Statement of Financial Interests**
- **III. Form 1F: Final Statement of Financial Interests**

E. Form 8B: Memorandum of Voting Conflict

FOURTH ORDER OF BUSINESS **Consideration of Resolution 2021-01, Designating a Chair, a Vice Chair, a Secretary, and Assistant Secretaries of the Creekview Community Development District, and Providing for an Effective Date**

Mr. Wrathell presented Resolution 2021-01. Mr. O'Reilly nominated the following:

Liam O'Reilly	Chair
Allen Skinner	Vice Chair
Craig Wrathell	Secretary
Richard Skinner	Assistant Secretary
Gregg Kern	Assistant Secretary
Blake Weatherly	Assistant Secretary
Cindy Cerbone	Assistant Secretary
Kristen Suit	Assistant Secretary

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-01, Designating a Chair, a Vice Chair, a Secretary, and Assistant Secretaries of the Creekview Community Development District, as nominated, and Providing for an Effective Date, was adopted.

FIFTH ORDER OF BUSINESS **Consideration of Resolution 2021-02, Designating a Treasurer and Assistant Treasurer of the District and Providing an Effective Date**

Mr. Wrathell presented Resolution 2021-02. The following nominations were made:

Craig Wrathell	Treasurer
Jeff Pinder	Assistant Treasurer

No other nominations were made.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-02, Designating a Treasurer and Assistant Treasurer of the District, as nominated, and Providing an Effective Date, was adopted.

SIXTH ORDER OF BUSINESS **Consideration of Resolution 2021-03, Designating a Date, Time and Location for the Landowners' Meeting of the District, and Providing an Effective Date**

Mr. Wrathell presented Resolution 2021-03.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-03, Designating a Date, Time and Location of September 28, 2021 at 9:30 a.m., at the offices of Carlton Construction, Inc., 4615 U.S. Highway 17, Suite 1, Fleming Island, Florida 32003, for the Landowners' Meeting of the District, and Providing an Effective Date, was adopted.

ORGANIZATIONAL MATTERS

SEVENTH ORDER OF BUSINESS **Consideration of the Following Organizational Matters:**

A. Resolution 2021-04, Appointing and Fixing the Compensation of the District Manager and Methodology Consultant; Providing an Effective Date

- **Agreement for District Management Services: *Wrathell, Hunt and Associates, LLC***

Mr. Wrathell presented Resolution 2021-04. The following adjustment was made to the Agreement:

Page 15, Fee Schedule, Item 2: Change $5,500 annually to $5,000 annually

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-04, Appointing and Fixing the Compensation of Wrathell, Hunt and Associates, LLC, as the District Manager and Methodology Consultant; Providing an Effective Date, with the amendment to the Fee Schedule, was adopted.

B. Resolution 2021-05, Appointing District Counsel for the District, and Authorizing Compensation and Providing for an Effective Date

- **Fee Agreement: *KE LAW GROUP, PLLC***

Mr. Wrathell presented Resolution 2021-05.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-05, Appointing KE Law Group, PLLC as District Counsel for the District, and Authorizing Compensation and Providing for an Effective Date, was adopted.

C. Resolution 2021-06, Designating a Registered Agent and Registered Office of the District; and Providing for an Effective Date

Mr. Wrathell presented Resolution 2021-06.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-06, Designating Wrathell, Hunt and Associates, LLC, as Registered Agent and 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431 as the Registered Office of the District; and Providing for an Effective Date, was adopted.

D. Resolution 2021-07, Appointing an Interim District Engineer, Authorizing its Compensation and Providing for an Effective Date

- **Interim Engineering Services Agreement:** ***England-Thims & Miller, Inc.***

Mr. Wrathell presented Resolution 2021-07 and the Interim Engineering Services Agreement with England-Thims & Miller, Inc. (ETM).

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-07, Appointing England-Thims & Miller, Inc., as Interim District Engineer for the District, Authorizing its Compensation and Providing for an Effective Date, was adopted.

E. Authorization of Request for Qualifications (RFQ) for Engineering Services

Mr. Wrathell presented the RFQ for District Engineering Services and the Competitive Selection Criteria.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, the Request for Qualifications for District Engineering Services and authorizing Staff to advertise, was approved.

F. Board Member Compensation: 190.006 (8), F.S.

The consensus of the Board was to accept compensation for attendance at meetings.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, acceptance of Board Member compensation, was approved.

G. Resolution 2021-08, Designating the Primary Administrative Office and Principal Headquarters of the District and Providing an Effective Date

This item was deferred to the next meeting.

H. Resolution 2021-09, Setting Forth the Policy of the Creekview Community Development District Board of Supervisors with Regard to the Support and Legal Defense of the Board of Supervisors and District Officers and Providing for an Effective Date

Mr. Wrathell presented Resolution 2021-09. The Resolution sets forth the CDD's Policy for the support and legal defense of Board Members and Staff specifically related to CDD activities.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-09, Setting Forth the Policy of the Creekview Community Development District Board of Supervisors with Regard to the Support and Legal Defense of the Board of Supervisors and District Officers and Providing for an Effective Date, was adopted.

- **Authorization to Obtain General Liability and Public Officers' Insurance**

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, authorizing Staff to obtain General Liability and Public Officers' insurance and authorizing the Chair to execute, was approved.

I. Resolution 2021-10, Providing for the Public's Opportunity to Be Heard; Designating Public Comment Periods; Designating a Procedure to Identify Individuals Seeking to Be Heard; Addressing Public Decorum; Addressing Exceptions; and Providing for Severability and an Effective Date

Mr. Wrathell presented Resolution 2021-10. This Resolution sets forth the CDD's policy and outlines the procedures for public comments.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-10, Providing for the Public's Opportunity to Be Heard; Designating Public Comment Periods; Designating a Procedure to Identify Individuals Seeking to Be Heard; Addressing Public Decorum; Addressing Exceptions; and Providing for Severability and an Effective Date, was adopted.

J. Resolution 2021-11, Providing for the Appointment of a Records Management Liaison Officer; Providing the Duties of the Records Management Liaison Officer; Adopting a Records Retention Policy; and Providing for Severability and Effective Date

Mr. Wrathell presented Resolution 2021-11.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-11, Providing for the Appointment of Wrathell, Hunt and Associates, LLC, as the Records Management Liaison Officer; Providing the Duties of the Records Management Liaison Officer; Adopting a Records Retention Policy; and Providing for Severability and Effective Date, was adopted.

K. Resolution 2021-12, Granting the Chair and Vice Chair the Authority to Execute Real and Personal Property Conveyance and Dedication Documents, Plats and Other Documents Related to the Development of the District's Improvements; Approving the Scope and Terms of Such Authorization; Providing for a Severability Clause; and Providing an Effective Date

Mr. Wrathell presented Resolution 2021-12. This grants the Chair or the Vice Chair, in concert with the District Engineer, District Counsel and Staff, the authority to execute certain documents, between meetings, to avoid construction delays.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-12, Granting the Chair and Vice Chair, the Authority to Execute Real and Personal Property Conveyance and Dedication Documents, Plats and Other Documents Related to the Development of the District's Improvements; Approving the Scope and Terms of Such Authorization; Providing for a Severability Clause; and Providing an Effective Date, was adopted.

L. Resolution 2021-13, Ratifying the Recording of the Notice of Establishment of the Creekview Community Development District, and Providing for an Effective Date

Mr. Wrathell presented Resolution 2021-13.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-13, Ratifying the Recording of the Notice of Establishment of the Creekview Community Development District and Providing for an Effective Date, was adopted.

M. Authorization of Request for Proposals (RFP) for Annual Audit Services

- **Designation of Board of Supervisors as Audit Committee**

Mr. Wrathell presented the RFP For Annual Audit Services and Auditor Selection Evaluation Criteria.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, the Request for Proposals for Annual Auditing Services and Ranking Criteria, authorizing the District Manager to advertise and designating the Board of Supervisors as the Audit Selection Committee , was approved.

N. Strange Zone, Inc., Quotation #M21-1010 for District Website Design, Maintenance and Domain Web-Site Design Agreement

Mr. Wrathell presented the Strange Zone, Inc. (SZI) proposal for website creation and annual maintenance, hosting, email domain registration and SSL certificates.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, the Strange Zone, Inc., Quotation #M21-1010 for District Website Services, Design, Maintenance and Domain, in the amount of $1,679.99, was approved.

O. ADA Site Compliance Proposal for Website Compliance Shield, Accessibility Policy and One (1) Annual Technological Audit

Mr. Wrathell stated that Management engaged ADA Site Compliance (ADASC) to assist in bringing the CDD website into compliance with the Americans with Disabilities Act (ADA) requirements for websites and to affix an ADA Site Compliance seal on the homepage. The cost is $210 per year.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, the ADA Site Compliance Proposal for Website Compliance Shield, Accessibility Policy and One (1) Annual Technological Audit, in the amount of $210 per year, was approved.

P. Resolution 2021-14, Designating the Date, Time and Place of a Public Hearing and Authorizing Publication of a Notice of Such Hearing for the Purpose of Adopting Rules of Procedure of the District; and Providing an Effective Date.

Mr. Wrathell presented Resolution 2021-14.

I. Rules of Procedure

II. Notices

- **Notice of Rule Development**
- **Notice of Rulemaking**

The Rules of Procedure and Notices were included for informational purposes.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-14, Designating October 26, 2021 at 9:30 a.m., at the offices of Carlton Construction, Inc., 4615 U.S. Highway 17, Suite 1, Fleming Island, Florida 32003, as the Date, Time and Place of a Public Hearing and Authorizing Publication of a Notice of Such Hearing for the Purpose of Adopting Rules of Procedure; and Providing an Effective Date, was adopted.

Q. Resolution 2021-15, Adopting the Annual Meeting Schedule for Fiscal Year 2021/2022; and Providing for an Effective Date

Mr. Wrathell presented Resolution 2021-14.

The following change was made to the Fiscal Year 2022 meeting schedule:

TIME: Change "10:30 a.m." to "9:30 a.m."

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-15, Adopting the Annual Meeting Schedule for Fiscal Year 2021/2022, as amended, and Providing for an Effective Date, was adopted.

R. Resolution 2021-16, Approving the Florida Statewide Mutual Aid Agreement; Providing for Severability; and Providing for an Effective Date

Mr. Wrathell presented Resolution 2021-16. In the event of an emergency or natural disaster, the CDD may request assistance from other local governments.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-16, Approving the Florida Statewide Mutual Aid Agreement; Providing for Severability; and Providing for an Effective Date, was adopted.

BANKING MATTERS

EIGHTH ORDER OF BUSINESS **Consideration of the Following Banking Matters:**

A. Resolution 2021-17, Designating a Public Depository for Funds of the District and Providing an Effective Date

Mr. Wrathell presented Resolution 2021-17. Management recommended SunTrust Truist Bank as the Qualified Public Depository for the CDD's accounts.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-17, Designating SunTrust Truist Bank as Public Depository for Funds of the District and Providing an Effective Date, was adopted.

B. Resolution 2021-18, Directing Wrathell, Hunt & Associates, LLC, to Establish a Local Bank Account for the District and Appoint Signors on the Account; and Providing for an Effective Date

Mr. Wrathell presented Resolution 2021-18. The Chair, Treasurer and Assistant Treasurer will be authorized signors. Funding requests should be sent to Mr. Liam O'Reilly.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-18, Directing Wrathell, Hunt & Associates, LLC, to Establish a Local Bank Account and Appoint Signors on the Account; and Providing for an Effective Date, was adopted.

C. Resolution 2021-19, Authorizing the District Manager or Treasurer to Execute the Public Depositors Report; Authorizing the Execution of Any Other Financial Reports as Required by Law; Providing for an Effective Date

Mr. Wrathell presented Resolution 2021-19.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-19, Authorizing the District Manager or Treasurer to Execute the Public Depositors Report; Authorizing the Execution of Any Other Financial Reports as Required by Law; Providing for an Effective Date, was adopted.

BUDGETARY MATTERS

NINTH ORDER OF BUSINESS **Consideration of the Following Budgetary Matters:**

A. Resolution 2021-20, Approving a Proposed Budget for Fiscal Year 2020/2021 and 2021/2022 and Setting a Public Hearing Thereon Pursuant to Florida Law; and Providing for an Effective Date

Mr. Wrathell presented Resolution 2021-20. He reviewed the proposed Fiscal Year 2021 and proposed Fiscal Year 2022 budgets.

Regarding the proposed Fiscal Year 2021 budget, Staff would double check the $7,500 "Management fee" line item, on Page 1. Regarding Page 1 of the proposed Fiscal Year 2022 budget, Staff would add $5,000 to the "Debt service Accounting" for pro-ration.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-20, Approving a Proposed Budget for Fiscal Years 2020/2021 and 2021/2022, as amended, and Setting a Public Hearing Thereon Pursuant to Florida Law for October 26, 2021 at 9:30 a.m., at the offices of Carlton Construction, Inc., 4615 U.S. Highway 17, Suite 1, Fleming Island, Florida 32003; and Providing for an Effective Date, was adopted.

B. Fiscal Year 2020/2021 and 2021/2022 Budget Funding Agreement

Mr. Wrathell presented the Fiscal Year 2020/2021 and 2021/2022 Budget Funding Agreement. The Developer would provide funding on an as-needed basis.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, the Fiscal Year 2020/2021 and 2021/2022 Budget Funding Agreement, was approved.

C. Resolution 2021-21, Adopting the Alternative Investment Guidelines for Investing Public Funds in Excess of Amounts Needed to Meet Current Operating Expenses, in Accordance with Section 218.415(17), Florida Statues

Mr. Wrathell presented Resolution 2021-21.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-21, Adopting the Alternative Investment Guidelines for Investing Public Funds in Excess of Amounts Needed to Meet Current Operating Expenses, in Accordance with Section 218.415(17), Florida Statues, was adopted.

D. Resolution 2021-22, Authorizing the Disbursement of Funds for Payment of Certain Continuing Expenses Without Prior Approval of the Board of Supervisors; Authorizing the Disbursement of Funds for Payment of Certain Non-Continuing Expenses Without Prior Approval of the Board of Supervisors; Providing for a Monetary Threshold; and Providing for an Effective Date

Mr. Wrathell presented Resolution 2021-22.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-22, Authorizing the Disbursement of Funds for Payment of Certain Continuing Expenses Without Prior Approval of the Board of Supervisors; Authorizing the Disbursement of Funds for Payment of Certain Non-Continuing Expenses Without Prior Approval of the Board of Supervisors; Providing for a Monetary Threshold; and Providing for an Effective Date, was adopted.

E. Resolution 2021-23, Adopting a Policy for Reimbursement of District Travel Expenses; and Providing for Severability and an Effective Date

Mr. Wrathell presented Resolution 2021-23.

On MOTION Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-23, Adopting a Policy for Reimbursement of District Travel Expenses; and Providing for Severability and an Effective Date, was adopted.

F. Resolution 2021-24, Adopting Prompt Payment Policies and Procedures Pursuant to Chapter 218, Florida Statutes; Providing a Severability Clause and Providing an Effective Date

Mr. Wrathell presented Resolution 2021-24.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-24, Adopting Prompt Payment Policies and Procedures Pursuant to Chapter 218, Florida Statutes; Providing a Severability Clause; and Providing an Effective Date, was adopted.

G. Resolution 2021-25, Adopting an Internal Controls Policy Consistent with Section 218.33, Florida Statutes; Providing an Effective Date

Mr. Wrathell presented Resolution 2021-25. District Management already has these policies in place as part of the annual audit process.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-25, Adopting an Internal Controls Policy Consistent with Section 218.33, Florida Statutes; Providing for an Effective Date, was adopted.

BOND FINANCING RELATED MATTERS

TENTH ORDER OF BUSINESS **Consideration of the Following Bond Financing Related Matters:**

A. Bond Financing Team Funding Agreement

Mr. Wrathell presented the Bond Financing Team Funding Agreement.

On MOTION by Mr. O'Reilly and seconded by Mr. Allen Skinner, with all in favor, the Bond Financing Team Funding Agreement between the Creekview CDD and GreenPointe Developers, LLC, was approved.

B. Engagement of Bond Financing Professionals

I. Resolution 2021-26, Appointing an Investment Banker in Contemplation of the Issuance of Creekview Community Development District Special Assessment Revenue Bonds [FMSbonds, Inc.]

Mr. Wrathell presented Resolution 2021-26. The Underwriter's fee would be 2% of the par amount of the bonds issued.

On MOTION by Mr. O'Reilly and Seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-26, Appointing FMSbonds, Inc., as Investment Banker in Contemplation of the Issuance of Creekview Community Development District Special Assessment Revenue Bonds, was adopted.

II. Resolution 2021-27, Appointing Bond Counsel in Contemplation of the Issuance of Creekview Community Development District Special Assessment Revenue Bonds [Akerman, LLP]

Mr. Wrathell presented Resolution 2021-27. Mr. Peter Dame would serve as Bond Counsel for the District. The cost of the first bond issuance would be $40,000.

On MOTION by Mr. O'Reilly and Seconded by Mr. Allen Skinner, with all in favor Resolution 2021-27, Appointing Akerman, LLP as Bond Counsel in Contemplation of the Issuance of Creekview Community Development District Special Assessment Revenue Bonds, was adopted.

III. Resolution 2021-28, Appointing Trustee, Paying Agent and Registrar in Contemplation of the Issuance of Creekview Community Development District Bonds [U.S. Bank, N.A.]

Mr. Wrathell presented Resolution 2021-28.

On MOTION by Mr. O'Reilly and Seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-28, Appointing U.S. Bank, N.A., as Trustee, Paying Agent and Registrar in Contemplation of the Issuance of Creekview Community Development District Bonds, was adopted.

C. Resolution 2021-29, Designating a Date, Time, and Location of a Public Hearing Regarding the District's Intent to Use the Uniform Method for the Levy, Collection, and Enforcement of Non-Ad Valorem Special Assessments as Authorized by Section 197.3632, Florida Statutes; Authorizing the Publication of the Notice of Such Hearing; and Providing an Effective Date

Mr. Wrathell presented Resolution 2021-29 and read the title.

On MOTION by Mr. O'Reilly and Seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-29, Designating a Date, Time, and Location of October 26, 2021 at 9:30 a.m., at the offices of Carlton Construction, Inc., 4615 U.S. Highway 17, Suite 1, Fleming Island, Florida 32003, for a Public Hearing Regarding the District's Intent to Use the Uniform Method for the Levy, Collection, and Enforcement of Non-Ad Valorem Special Assessments as Authorized by Section 197.3632, Florida Statutes; Authorizing the Publication of the Notice of Such Hearing; and Providing an Effective Date, was adopted.

D. Presentation of Capital Improvement Plan

Mr. Wild presented the Capital Improvement Plan (CIP) Report, dated August 26, 2021. The Master Infrastructure total was $90,549,000.

A Board Member asked what the difference was between the August 2, 2021 and August 26, 2021 versions. Mr. Wild stated there was a typographical error in the total amount on Page 2. Asked about the need for Board approval, Ms. Kilinski stated the CIP Report is included in the items approved in the Delegation Resolution.

E. Presentation of Master Special Assessment Methodology Report

Mr. Wrathell presented the Master Special Assessment Methodology Report dated August 23, 2021. He noted the pertinent data in each Section, including the special and general benefits, the CIP, project costs, Equivalent Residential Unit (ERU) weightings, bond issuances and the Appendix Tables on Pages 11 through 13.

F. Resolution 2021-30, Declaring Special Assessments; Designating the Nature and Location of the Proposed Improvements; Declaring the Total Estimated Cost of the Improvements, the Portion to be Paid by Assessments, and the Manner and Timing in Which the Assessments are to be Paid; Designating the Lands Upon Which the Assessments Shall Be Levied; Providing for an Assessment Plat and a Preliminary Assessment Roll; Addressing the Setting of Public Hearings; Providing for Publication of this Resolution; and Addressing Conflicts, Severability and an Effective Date.

Mr. Wrathell presented Resolution 2021-30 and read the title. The assessment Public Hearing was set for October 26, 2021 at 9:30 a.m., at the offices of Carlton Construction, Inc., 4615 U.S. Highway 17, Suite 1, Fleming Island, Florida 32003. Ms. Kilinski stated the estimated master infrastructure cost is $90,540,000 and the round up figure in the Master Methodology is $115,325,000.

On MOTION by Mr. O'Reilly and Seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-30, Declaring Special Assessments; Designating the Nature and Location of the Proposed Improvements; Declaring the Total Estimated Cost of the Improvements, the Portion to be Paid by Assessments, and the Manner and Timing in Which the Assessments are to be Paid; Designating the Lands Upon Which the Assessments Shall Be Levied; Providing for an Assessment Plat and a Preliminary Assessment Roll; Addressing the Setting of Public Hearings; Providing for Publication of this Resolution; and Addressing Conflicts, Severability and an Effective Date, was adopted.

G. Resolution 2021-31, Authorizing the Issuance of Not Exceeding $115,325,000 Principal Amount Creekview Community Development District Special Assessment Revenue Bonds, In One or More Series; for the Purpose of Financing the Construction and/or Acquisition by the District of the Public Improvements and Community Facilities Permitted by the Provisions of Chapter 190, Florida Statutes and the Ordinance Establishing the District; Approving a Form of Master Trust Indenture; Approving and Appointing a Trustee; Authorizing the Commencement of Validation Proceedings Relating to the Foregoing Bonds; Authorizing and Approving Other Matters Relating to the Foregoing Bonds; and Providing an Effective Date

Ms. Kilinski presented Resolution 2021-31. This Resolution accomplishes the following:

- Approves the forms of the Master Trust Indenture.
- Appoints U.S. Bank as Trustee.
- Certifies that the Resolution was adopted during the meeting.

Ms. Kilinski stated a bond validation complaint would be filed after all the Resolutions are executed following this meeting.

On MOTION by Mr. O'Reilly and Seconded by Mr. Allen Skinner, with all in favor, Resolution 2021-31, Authorizing the Issuance of Not Exceeding $115,325,000 Principal Amount Creekview Community Development District Special Assessment Revenue Bonds, In One or More Series; for the Purpose of Financing the Construction and/or Acquisition by the District of the Public Improvements and Community Facilities Permitted by the Provisions of Chapter 190, Florida Statutes and the Ordinance Establishing the District; Approving a Form of Master Trust Indenture; Approving and Appointing a Trustee; Authorizing the Commencement of Validation Proceedings Relating to the Foregoing Bonds; Authorizing and Approving Other Matters Relating to the Foregoing Bonds; and Providing an Effective Date, was adopted.

ELEVENTH ORDER OF BUSINESS **Staff Reports**

A. District Counsel: *KE Law Group, PLLC*

There was nothing further to report.

B. District Engineer (Interim): *England-Thims & Miller, Inc.*

There was nothing further to report.

C. District Manager: *Wrathell, Hunt and Associates, LLC*

There was nothing further to report.

TWELFTH ORDER OF BUSINESS **Board Members' Comments/Requests**

There were no Board Members' comments or requests.

THIRTEENTH ORDER OF BUSINESS **Public Comments**

There were no public comments.

FOURTEENTH ORDER OF BUSINESS **Adjournment**

There being nothing further to discuss, the meeting adjourned.

On MOTION by Mr. O'Reilly and Seconded by Mr. Allen Skinner, with all in favor, the meeting adjourned at 11:40 a.m.

[SIGNATURES APPEAR ON THE FOLLOWING PAGE]

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615 _____ _____
616 Secretary/Assistant Secretary Chair/Vice Chair

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

16B

DRAFT

MINUTES OF MEETING
CREEKVIEW
COMMUNITY DEVELOPMENT DISTRICT

The Creekview Community Development District held a Landowners' Meeting on September 28, 2021, at 9:30 a.m., at the offices of Carlton Construction, Inc., 4615 U.S. Highway 17, Suite 1, Fleming Island, Florida 32003.

Present at the meeting were:

Kristen Suit	District Manager
Lauren Gentry	District Counsel
Jennifer Kilinski	KE Law Group, PLLC
Liam O'Reilly	Creekview CDD Board Member
Gregg Kern	Creekview CDD Board Member

FIRST ORDER OF BUSINESS **Call to Order/Roll Call**

Ms. Suit called the meeting to order at 9:32 a.m., and stated that she was previously named as proxy holder for the Landowner, Bradley Creek Holdings, LLC.

SECOND ORDER OF BUSINESS **Affidavit/Proof of Publication**

The affidavit of publication was included for informational purposes.

THIRD ORDER OF BUSINESS **Election of Chair to Conduct Landowners' Meeting**

Ms. Suit served as Chair to conduct the Landowners' meeting.

FOURTH ORDER OF BUSINESS **Election of Supervisors [All Seats]**

A. Nominations

The following nominations were made:

Seat 1	Allen Skinner
Seat 2	Richard Skinner
Seat 3	Blake Weatherly
Seat 4	Gregg Kern

Seat 5	Liam O'Reilly	

No other nominations were made.

B. Casting of Ballots

- **Determine Number of Voting Units Represented**

Ms. Suit stated a total of 746 voting units were represented.

- **Determine Number of Voting Units Assigned by Proxy**

Of the 746 voting units represented, all were assigned by proxy to Ms. Suit.

Ms. Suit cast the following votes:

Seat 1	Allen Skinner	600 votes
Seat 2	Richard Skinner	500 votes
Seat 3	Blake Weatherly	500 votes
Seat 4	Gregg Kern	500 votes
Seat 5	Liam O'Reilly	600 votes

C. Ballot Tabulation and Results

Ms. Suit reported the ballot tabulation, results and term lengths, as follows:

Seat 1	Allen Skinner	600 votes	4-Year Term
Seat 2	Richard Skinner	500 votes	2-Year Term
Seat 3	Blake Weatherly	500 votes	2-Year Term
Seat 4	Gregg Kern	500 votes	2-Year Term
Seat 5	Liam O'Reilly	600 votes	4-Year Term

FIFTH ORDER OF BUSINESS **Landowners' Questions/Comments**

There were no Landowners' questions or comments.

SIXTH ORDER OF BUSINESS **Adjournment**

There being nothing further to discuss, the meeting adjourned at 9:34 a.m.

[SIGNATURES APPEAR ON THE FOLLOWING PAGE]

_____ _____

Secretary/Assistant Secretary Chair/Vice Chair

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

17A

MEMORANDUM

To: District Manager
District Engineer

From: District Counsel

Date: October 12, 2021

Subject: Stormwater Management Needs Analysis
(Chapter 2021-194, Laws of Florida/HB53)

We are writing with an update regarding the new law requiring special districts that either own or operate stormwater management systems, stormwater management programs or wastewater services to create a 20-year needs analysis of such system(s).

The Office of Economic and Demographic Research ("OEDR") recently promulgated additional details and an excel template for reporting the stormwater needs analyses (attached hereto for reference). Similar documents for the wastewater needs analyses will be available soon at which time we will again supplement this memorandum.

A brief summary of the new law and its requirements were set forth in our previous memorandum, attached to this memorandum for your reference in **Exhibit A**. Please feel free to contact us with any questions.

When is the deadline?

For both wastewater and stormwater, the first analysis must be submitted by **June 30, 2022** and updated every five (5) years thereafter. The needs analysis, along with the methodology and any supporting data necessary to interpret the results, must be submitted to the county in which the largest portion of the service area or stormwater system is located.

What steps should the District take?

- District engineers should review the stormwater needs analysis excel workbook and submit a work authorization for approval by the District's Board prior to commencing work. We recommend presenting the work authorization to the Board as soon as is practical, but no later than the first quarter of 2022.

- District managers should review the stormwater needs analysis excel workbook and start entering information that is readily available. The district manager may be able to complete the "background information" section and provide data on stormwater O&M expenditures, among other assistance.

- Once the work authorization is approved, the district manager should work with the district engineer to complete the remainder of the stormwater needs analyses with the final version submitted to the District no later than May 15, 2022.

- In some cases, districts may require outside consulting or evaluation to complete the needs analyses. Since the necessity of this additional step may not be immediately apparent, we recommend that district managers begin coordinating with their engineers as soon as possible.

Stormwater Needs Analysis Resources from OEDR

- OEDR website http://edr.state.fl.us/Content/natural-resources/stormwaterwastewater.cfm

- Excel Workbook (stormwater needs analysis reporting template)
  http://edr.state.fl.us/Content/natural-resources/Stormwater_Needs_Analysis.xlsx
  (last updated October 8, 2021)

- PDF Version for (essentially the same as the Excel workbook)
  http://edr.state.fl.us/Content/natural-resources/Stormwater_Needs_Analysis.pdf
  (last updated October 8, 2021)

Wastewater Needs Analysis Resources from OEDR

- Forthcoming.

Exhibit A

MEMORANDUM

To:	District Manager, District Engineer
From:	District Counsel
Date:	September 7, 2021
Subject:	Wastewater Services and Stormwater Management Needs Analysis (Chapter 2021-194, Laws of Florida/HB53)

We are writing to inform you of a new law requiring special districts that either own or operate stormwater management systems, stormwater management programs or wastewater services to create a 20-year needs analysis of such system(s). The requirements relating to wastewater services are found in Section 4 of Chapter 2021-194, Laws of Florida, creating Section 403.9301, Florida Statutes, and the requirements relating to stormwater management programs and systems are found in Section 5 of Chapter 2021-194, Laws of Florida, creating Section 403.9302, Florida Statutes (attached hereto for reference).

A brief summary of the new law and its requirements is set forth below. Please feel free to contact us with any questions.

What is required?

The Office of Economic and Demographic Research ("OEDR") is expected to promulgate additional details about the requirements of the needs analyses. However, certain general requirements are set forth in the new law.

For wastewater services, the needs analysis must include:

a) A detailed description of the facilities used to provide wastewater services.

b) The number of current and projected connections and residents served calculated in 5-year increments.

c) The current and projected service area for wastewater services.

d) The current and projected cost of providing wastewater services calculated in 5-year increments.

e) The estimated remaining useful life of each facility or its major components.

f) The most recent 5-year history of annual contributions to, expenditures from, and balances of any capital account for maintenance or expansion of any facility or its major components.

g) The local government's plan to fund the maintenance or expansion of any facility or its major components. The plan must include historical and estimated future revenues and expenditures with an evaluation of how the local government expects to close any projected funding gap.

For stormwater management programs and stormwater management systems, the needs analysis must include:

a) A detailed description of the stormwater management program or stormwater management system and its facilities and projects.

b) The number of current and projected residents served calculated in 5-year increments.

c) The current and projected service area for the stormwater management program or stormwater management system.

d) The current and projected cost of providing services calculated in 5-year increments.

e) The estimated remaining useful life of each facility or its major components.

f) The most recent 5-year history of annual contributions to, expenditures from, and balances of any capital account for maintenance or expansion of any facility or its major components.

g) The local government's plan to fund the maintenance or expansion of any facility or its major components. The plan must include historical and estimated future revenues and expenditures with an evaluation of how the local government expects to close any projected funding gap.

When is the deadline?

For both wastewater and stormwater, the first analysis must be created by **June 30, 2022**, and the analysis must be updated every five (5) years thereafter. The needs analysis, along with the methodology and any supporting data necessary to interpret the results, must be submitted to the county in which the largest portion of the service area or stormwater system is located.

What steps should districts take?

District engineers and district managers should begin by evaluating what information is already available to the district, and what new information may need to be gathered. Each district should approve a work authorization for their district engineer to create the needs analysis report and should consider proposals for any outside consulting or evaluation that may be necessary, though in most cases we expect this will not be required. In order to provide ample time for completion of the necessary needs analysis reports, we recommend presenting these items for board consideration no later than the first quarter of 2022, or as soon thereafter as is practical. OEDR is anticipated to provide further guidelines for the reporting requirements, none of which we expect to be particularly burdensome, and which will likely include information readily available to districts' engineering and/or environmental professionals. Once we receive further guidance, we will supplement this informational memorandum.

CHAPTER 2021-194

Committee Substitute for Committee Substitute for Committee Substitute for House Bill No. 53

An act relating to public works; amending s. 255.0991, F.S.; revising a prohibition relating to any solicitation for construction services paid for with state appropriated funds; amending s. 255.0992, F.S.; revising the definition of the term "public works project"; prohibiting the state or any political subdivision that contracts for a public works project from taking specified action against certain persons that are engaged in a public works project or have submitted a bid for such a project; providing applicability; amending s. 403.928, F.S.; requiring the Office of Economic and Demographic Research to include an analysis of certain expenditures in its annual assessment; creating s. 403.9301, F.S.; providing definitions; requiring counties, municipalities, and special districts that provide wastewater services to develop a needs analysis that includes certain information by a specified date; requiring municipalities and special districts to submit such analyses to a certain county; requiring the county to file a compiled document with the coordinator of the Office of Economic and Demographic Research by a specified date; requiring the office to evaluate the document and include an analysis in its annual assessment; providing applicability; creating s. 403.9302, F.S.; providing definitions; requiring counties, municipalities, and special districts that provide stormwater management to develop a needs analysis that includes certain information by a specified date; requiring municipalities and special districts to submit such analyses to a certain county; requiring the county to file a compiled document with the Secretary of Environmental Protection and the coordinator of the Office of Economic and Demographic Research by a specified date; requiring the office to evaluate the document and include an analysis in its annual assessment; providing applicability; providing a determination and declaration of important state interest; providing an effective date.

Be It Enacted by the Legislature of the State of Florida:

Section 1. Subsection (2) of section 255.0991, Florida Statutes, is amended to read:

255.0991 Contracts for construction services; prohibited local government preferences.—

(2) For <u>any</u> ~~a~~ competitive solicitation for construction services <u>paid for with any</u> ~~in which 50 percent or more of the cost will be paid from~~ state-appropriated funds ~~which have been appropriated at the time of the competitive solicitation~~, a state college, county, municipality, school district, or other political subdivision of the state may not use a local ordinance or regulation <u>to prevent a certified, licensed, or registered contractor,</u>

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subcontractor, or material supplier or carrier, from participating in the bidding process ~~that provides a preference~~ based upon:

(a) ~~The contractor's~~ Maintaining an office or place of business within a particular local jurisdiction;

(b) ~~The contractor's~~ Hiring employees or subcontractors from within a particular local jurisdiction; or

(c) ~~The contractor's~~ Prior payment of local taxes, assessments, or duties within a particular local jurisdiction.

Section 2. Paragraph (b) of subsection (1) and subsections (2) and (3) of section 255.0992, Florida Statutes, are amended to read:

255.0992 Public works projects; prohibited governmental actions.—

(1) As used in this section, the term:

(b) "Public works project" means an activity exceeding $1 million in value that is ~~of which 50 percent or more of the cost will be~~ paid for with any ~~from~~ state-appropriated funds ~~that were appropriated at the time of the competitive solicitation~~ and which consists of the construction, maintenance, repair, renovation, remodeling, or improvement of a building, road, street, sewer, storm drain, water system, site development, irrigation system, reclamation project, gas or electrical distribution system, gas or electrical substation, or other facility, project, or portion thereof that is owned in whole or in part by any political subdivision.

(2)~~(a)~~ Except as required by federal or state law, the state or any political subdivision that contracts for a public works project may not take the following actions:

(a) Prevent a certified, licensed, or registered contractor, subcontractor, or material supplier or carrier, from participating in the bidding process based on the geographic location of the company headquarters or offices of the contractor, subcontractor, or material supplier or carrier submitting a bid on a public works project or the residences of employees of such contractor, subcontractor, or material supplier or carrier.

(b) Require that a contractor, subcontractor, or material supplier or carrier engaged in a public works ~~such~~ project:

1. Pay employees a predetermined amount of wages or prescribe any wage rate;

2. Provide employees a specified type, amount, or rate of employee benefits;

3. Control, limit, or expand staffing; or

4. Recruit, train, or hire employees from a designated, restricted, or single source.

(c)~~(b) The state or any political subdivision that contracts for a public works project may not~~ Prohibit any contractor, subcontractor, or material supplier or carrier able to perform such work that ~~who~~ is qualified, licensed, or certified as required by state or local law to perform such work from receiving information about public works opportunities or from submitting a bid on the public works project. This paragraph does not apply to vendors listed under ss. 287.133 and 287.134.

(3) This section does not apply to the following:

(a) Contracts executed under chapter 337.

(b) A use authorized by s. 212.055(1) which is approved by a majority vote of the electorate of the county or by a charter amendment approved by a majority vote of the electorate of the county.

Section 3. Paragraph (e) is added to subsection (1) of section 403.928, Florida Statutes, to read:

403.928 Assessment of water resources and conservation lands.—The Office of Economic and Demographic Research shall conduct an annual assessment of Florida's water resources and conservation lands.

(1) WATER RESOURCES.—The assessment must include all of the following:

(e) Beginning with the assessment due January 1, 2022, an analysis of the expenditures necessary to repair, replace, and expand water-related infrastructure. As part of this analysis, the office shall periodically survey public and private utilities.

Section 4. Section 403.9301, Florida Statutes, is created to read:

403.9301 Wastewater services projections.—

(1) The Legislature intends for each county, municipality, or special district providing wastewater services to create a 20-year needs analysis.

(2) As used in this section, the term:

(a) "Domestic wastewater" has the same meaning as provided in s. 367.021.

(b) "Facility" means any equipment, structure, or other property, including sewerage systems and treatment works, used to provide wastewater services.

(c) "Treatment works" has the same meaning as provided in s. 403.031(11).

(d) "Wastewater services" means service to a sewerage system, as defined in s. 403.031(9), or service to domestic wastewater treatment works.

(3) By June 30, 2022, and every 5 years thereafter, each county, municipality, or special district providing wastewater services shall develop a needs analysis for its jurisdiction over the subsequent 20 years. In projecting such needs, each local government shall include the following:

(a) A detailed description of the facilities used to provide wastewater services.

(b) The number of current and projected connections and residents served calculated in 5-year increments.

(c) The current and projected service area for wastewater services.

(d) The current and projected cost of providing wastewater services calculated in 5-year increments.

(e) The estimated remaining useful life of each facility or its major components.

(f) The most recent 5-year history of annual contributions to, expenditures from, and balances of any capital account for maintenance or expansion of any facility or its major components.

(g) The local government's plan to fund the maintenance or expansion of any facility or its major components. The plan must include historical and estimated future revenues and expenditures with an evaluation of how the local government expects to close any projected funding gap.

(4) Upon completing the requirements of subsection (3), each municipality or special district shall submit its needs analysis, as well as the methodology and any supporting data necessary to interpret the results, to the county within which the largest portion of its service area is located. Each county shall compile all analyses submitted to it under this subsection into a single document and include its own analysis in the document. The county shall file the compiled document with the coordinator of the Office of Economic and Demographic Research no later than July 31, 2022, and every 5 years thereafter.

(5) The Office of Economic and Demographic Research shall evaluate the compiled documents from the counties for the purpose of developing a statewide analysis for inclusion in the assessment due January 1, 2023, pursuant to s. 403.928.

(6) This section applies to a rural area of opportunity as defined in s. 288.0656 unless the requirements of this section would create an undue economic hardship for the county, municipality, or special district in the rural area of opportunity.

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Section 5. Section 403.9302, Florida Statutes, is created to read:

403.9302 Stormwater management projections.—

(1) The Legislature intends for each county, municipality, or special district providing a stormwater management program or stormwater management system to create a 20-year needs analysis.

(2) As used in this section, the term:

(a) "Facility" means any equipment, structure, or other property, including conveyance systems, used or useful in connection with providing a stormwater management program or stormwater management system.

(b) "Stormwater management program" has the same meaning as provided in s. 403.031(15).

(c) "Stormwater management system" has the same meaning as provided in s. 403.031(16).

(3) By June 30, 2022, and every 5 years thereafter, each county, municipality, or special district providing a stormwater management program or stormwater management system shall develop a needs analysis for its jurisdiction over the subsequent 20 years. In projecting such needs, each local government shall include the following:

(a) A detailed description of the stormwater management program or stormwater management system and its facilities and projects.

(b) The number of current and projected residents served calculated in 5-year increments.

(c) The current and projected service area for the stormwater management program or stormwater management system.

(d) The current and projected cost of providing services calculated in 5-year increments.

(e) The estimated remaining useful life of each facility or its major components.

(f) The most recent 5-year history of annual contributions to, expenditures from, and balances of any capital account for maintenance or expansion of any facility or its major components.

(g) The local government's plan to fund the maintenance or expansion of any facility or its major components. The plan must include historical and estimated future revenues and expenditures with an evaluation of how the local government expects to close any projected funding gap.

(4) Upon completing the requirements of subsection (3), each municipality or special district shall submit its needs analysis, as well as the

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methodology and any supporting data necessary to interpret the results, to the county within which the largest portion of its stormwater management program or stormwater management system is located. Each county shall compile all analyses submitted to it under this subsection into a single document and include its own analysis in the document. The county shall file the compiled document with the Secretary of Environmental Protection and the coordinator of the Office of Economic and Demographic Research no later than July 31, 2022, and every 5 years thereafter.

(5) The Office of Economic and Demographic Research shall evaluate the compiled documents from the counties for the purpose of developing a statewide analysis for inclusion in the assessment due January 1, 2023, pursuant to s. 403.928.

(6) This section applies to a rural area of opportunity as defined in s. 288.0656 unless the requirements of this section would create an undue economic hardship for the county, municipality, or special district in the rural area of opportunity.

Section 6. The Legislature determines and declares that this act fulfills an important state interest.

Section 7. This act shall take effect July 1, 2021.

Approved by the Governor June 29, 2021.

Filed in Office Secretary of State June 29, 2021.

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TEMPLATE FOR LOCAL GOVERNMENTS AND SPECIAL DISTRICTS FOR PERFORMING A STORMWATER NEEDS ANALYSIS PURSUANT TO SECTION 5 OF SECTION 403.9302, FLORIDA STATUTES

INTRODUCTION

As part of the 2021 regular session, the Legislature recognized the need for a long-term planning process for stormwater and wastewater. Section 403.9302, Florida Statutes, requires a 20-year needs analysis from the local governments providing stormwater services. Because this planning document is forward-looking, it will necessarily include a large number of assumptions about future actions. These assumptions should be based on any available information coupled with best professional judgment of the individuals completing the document.

Completing this template by June 30, 2022, will fulfill the statutory requirements for the first round of 20-year needs analyses for stormwater. The template was generated by EDR in cooperation with local governments, Special Districts, the Florida Department of Environmental Protection (DEP), the Water Management Districts, the Florida Stormwater Association, private consultants, and others. Use of this tool will help ensure that information is compiled consistently for the Office of Economic & Demographic Research's (EDR) report to the Legislature.

For the purposes of this document, a stormwater management program and a stormwater management system are as defined in statute (s. 403.031(15) and (16), F.S., respectively; language provided here: https://www.flsenate.gov/Laws/Statutes/2021/403.031). Plainly speaking, the "program" is the institutional framework whereby stormwater management activities (MS4 NPDES permit activities, and other regulatory activities, construction, operation and maintenance, *etc.*) are carried out by the public authority. The "system" comprises the physical infrastructure that is owned and/or operated by the local government or special district that specifically is intended to control, convey or store stormwater runoff for treatment and flood protection purposes.

For the purposes of this document, the following guiding principles have been adopted:

- Stormwater systems or facilities owned and operated by any of the following are excluded from reporting requirements for local governments and special districts:
  - Private entities or citizens
  - Federal government
  - State government, including the Florida Department of Transportation (FDOT)
  - Water Management Districts
  - School districts
  - State universities or Florida colleges
- Local government expenditures associated with routine operation and maintenance are fully funded prior to commencing new projects and initiatives.
- Local government submissions will include the activities of dependent special districts. Only independent special districts report separately. For a list of all special districts in the state and their type (*i.e.,* dependent or independent), please see the Department of Economic Opportunity's Official List of Special Districts at the following link: http://specialdistrictreports.floridajobs.org/webreports/alphalist.aspx.
- With respect to federal and state statutes and rulemaking, current law and current administration prevails throughout the 20-year period. In other words, the state's present legal framework (*i.e.,* the status quo) continues throughout the period.

GENERAL INSTRUCTIONS FOR USING THE TEMPLATE

Instructions for submitting the template are still under development. Additional information regarding submission and answers to frequently asked questions will be posted on EDR's website, along with other useful materials, here: http://edr.state.fl.us/Content/natural-resources/stormwaterwastewater.cfm

The statutory language forms the titles for each part. This template asks that you group your recent and projected expenditures in prescribed categories. A detailed list of the categories is provided in part 5.0.

The same project should not appear on multiple tables in the jurisdiction's response unless the project's expenditures are allocated between those tables. All expenditures should be reported in $1,000s (*e.g.,* five hundred thousand dollars should be reported as $500).

For any jurisdiction that is contracting with another jurisdiction where both could be reporting the same expenditure, please contact EDR for additional guidance. In situations where a reporting jurisdiction contracts with a non-reporting jurisdiction, (*i.e.,* FDOT, the water management districts, the state or federal government), the reporting jurisdiction should include the expenditures.

When reporting cost information, please only include the expenditures that have flowed, are flowing, or will likely flow through your jurisdiction's budget. While necessary to comply with the statute, the concept of "future expenditures" should be viewed as an expression of identified needs.

These projections are necessarily speculative and do not represent a firm commitment to future budget actions by the jurisdiction.

This Excel workbook contains three worksheets for data entry. (Along the bottom of the screen, the three tabs are highlighted green.) Empty cells with visible borders are unlocked for data entry. In the first tab, titled "Background through Part 4," the information requested is either text, a dropdown list (*e.g.,* Yes or No), or a checkbox. The next tab, "Part 5 through Part 8," contains tables for expenditure or revenue data as well as some follow-up questions that may have checkboxes, lists, or space for text.

In Part 5 and Part 6, the expenditure tables have space for up to 5 projects. More projects can be listed in the "Additional Projects" tab. This tab contains a table with space for up to 200 additional projects. In order for these additional projects and expenditures to be correctly classified and included in the final totals, each project must be assigned a Project Type and Funding Source Type the from the dropdown lists in columns B and C.

Links to Template Parts:

- Background Information
- Part 1
- Part 2
- Part 3
- Part 4
- Part 5
- Part 6
- Part 7
- Part 8
- Additional Projects - This table contains additional rows for projects that do not fit into the main tables in Parts 5 and 6

Background Information

Please provide your contact and location information, then proceed to the template on the next sheet.

Name of Local Government:	
Name of stormwater utility, if applicable:	
Contact Person	
Name:	
Position/Title:	
Email Address:	
Phone Number:	

Indicate the Water Management District(s) in which your service area is located.

- ☐ Northwest Florida Water Management District (NWFWMD)
- ☐ Suwannee River Water Management District (SRWMD)
- ☐ St. Johns River Water Management District (SJRWMD)
- ☐ Southwest Florida Water Management District (SWFWMD)
- ☐ South Florida Water Management District (SFWMD)

Indicate the type of local government:

- ☐ Municipality
- ☐ County
- ☐ Independent Special District

Part 1.0 Detailed description of the stormwater management program (Section 403.9302(3)(a), F.S.)

The stormwater management program, as defined in the Introduction, includes those activities associated with the management, operation and maintenance, and control of stormwater and stormwater management systems, including activities required by state and federal law. The detailed program description is divided into multiple subparts consisting of narrative and data fields.

Part 1.1 Narrative Description:

Please provide a brief description of the current institutional strategy for managing stormwater in your jurisdiction. Please include any mission statement, divisions or departments dedicated solely or partly to managing stormwater, dedicated funding sources, and other information that best describes your approach to stormwater:

On a scale of 1 to 5, with 5 being the highest, please indicate the importance of each of the following goals for your program:

0	1	2	3	4	5	
☐	☐	☐	☐	☐	☐	Drainage & flood abatement (such as flooding events associated with rainfall and hurricanes)
☐	☐	☐	☐	☐	☐	Water quality improvement (TMDL Process/BMAPs/other)
☐	☐	☐	☐	☐	☐	Reduce vulnerability to adverse impacts from flooding related to increases in frequency and duration of rainfall events, storm surge and sea level rise
						Other:
☐	☐	☐	☐	☐	☐	
☐	☐	☐	☐	☐	☐	
☐	☐	☐	☐	☐	☐	
☐	☐	☐	☐	☐	☐	

Part 1.2 Current Stormwater Program Activities:

Please provide answers to the following questions regarding your stormwater management program.

- Does your jurisdiction have an NPDES Municipal Separate Storm Sewer System (MS4) Permit?

  If yes, is your jurisdiction regulated under Phase I or Phase II of the NPDES Program:

- Does your jurisdiction have a dedicated stormwater utility?

  If no, do you have another funding mechanism?

  If yes, please describe your funding mechanism.

- Does your jurisdiction have a Stormwater Master Plan or Plans?

  If Yes:

  How many years does the plan(s) cover?

  Are there any unique features or limitations that are necessary to understand what the plan does or does not address?

  Please provide a link to the most recently adopted version of the document (if it is published online):

- Does your jurisdiction have an asset management (AM) system for stormwater infrastructure?

  If Yes, does it include 100% of your facilities?

  If your AM includes less than 100% of your facilities, approximately what percent of your facilities are included?

- Does your stormwater management program implement the following (answer Yes/No):

A construction sediment and erosion control program for new construction (plans review and/or inspection)?	
An illicit discharge inspection and elimination program?	
A public education program?	
A program to involve the public regarding stormwater issues?	
A "housekeeping" program for managing stormwater associated with vehicle maintenance yards, chemical storage, fertilizer management, *etc.* ?	
A stormwater ordinance compliance program (*i.e.,* for low phosphorus fertilizer)?	
Water quality or stream gage monitoring?	
A geospatial data or other mapping system to locate stormwater infrastructure (GIS, *etc.*)?	
A system for managing stormwater complaints?	

Other specific activities?

Notes or Comments on any of the above:

Part 1.3 Current Stormwater Program Operation and Maintenance Activities

Please provide answers to the following questions regarding the operation and maintenance activities undertaken by your stormwater management program.

- Does your jurisdiction typically assume maintenance responsibility for stormwater systems associated with new private development (*i.e.,* systems that are dedicated to public ownership and/or operation upon completion)?

Notes or Comments on the above:

- Does your stormwater operation and maintenance program implement any of the following (answer Yes/No)

Routine mowing of turf associated with stormwater ponds, swales, canal/lake banks, *etc.* ?	
Debris and trash removal from pond skimmers, inlet grates, ditches, *etc.* ?	
Invasive plant management associated with stormwater infrastructure?	
Ditch cleaning?	
Sediment removal from the stormwater system (vactor trucks, other)?	
Muck removal (dredging legacy pollutants from water bodies, canal, *etc.*)?	
Street sweeping?	
Pump and mechanical maintenance for trash pumps, flood pumps, alum injection, *etc.* ?	
Non-structural programs like public outreach and education?	

Other specific routine activities?

Part 2. Detailed description of the stormwater management system and its facilities and projects (continued Section 403.9302(3)(a), F.S.)

A stormwater management system, as defined in the Introduction, includes the entire set of site design features and structural infrastructure for collection, conveyance, storage, infiltration, treatment, and disposal of stormwater. It may include drainage improvements and measures to prevent streambank channel erosion and habitat degradation. This section asks for a summary description of your stormwater management system. It is not necessary to provide geospatial asset data or a detailed inventory. For some, it may be possible to gather the required data from your Asset Management (AM) system. For others, data may be gathered from sources such as an MS4 permit application, aerial photos, past or ongoing budget investments, water quality projects, or any other system of data storage/management that is employed by the jurisdiction.

Please provide answers to the following questions regarding your stormwater system inventory. Enter zero (0) if your system does not include the component.

	Number	Unit of Measurement
Estimated feet or miles of buried culvert:		
Estimated feet or miles of open ditches/conveyances (lined and unlined) that are maintained by the stormwater program:		
Estimated number of storage or treatment basins (*i.e.,* wet or dry ponds):		
Estimated number of gross pollutant separators including engineered sediment traps such as baffle boxes, hydrodynamic separators, *etc.* :		
Number of chemical treatment systems (*e.g.,* alum or polymer injection):		
Number of stormwater pump stations:		
Number of dynamic water level control structures (*e.g.,* operable gates and weirs that control canal water levels):		
Number of stormwater treatment wetland systems:		
Other:		

Notes or Comments on any of the above:

Which of the following green infrastructure best management practices do you use to manage water flow and/or improve water quality (answer Yes/No):

Best Management Practice	Current	Planned
Tree boxes		
Rain gardens		
Green roofs		
Pervious pavement/pavers		
Littoral zone plantings		
Living shorelines		
Other Best Management Practices:		

Please indicate which resources or documents you used when answering these questions (check all that apply).

- ☐ Asset management system
- ☐ GIS program
- ☐ MS4 permit application
- ☐ Aerial photos
- ☐ Past or ongoing budget investments
- ☐ Water quality projects

Other(s):

Part 3. The number of current and projected residents served calculated in 5-year increments (Section 403.9302(3)(b), F.S.)

Counties and municipalities: Instead of requiring separate population projections, EDR will calculate the appropriate population estimates for each municipality or the unincorporated area of the county. If your service area is less than or more than your local government's population, please describe in the first text box provided below for part 4.0.

Independent Special Districts:

If an independent special district's boundaries are completely aligned with a county or a municipality, identify that jurisdiction here:

Any independent special district whose boundaries do not coincide with a county or municipality must submit a GIS shapefile with the current and projected service area. EDR will calculate the appropriate population estimates based on that map. Submission of this shapefile also serves to complete Part 4.0 of this template.

Part 4.0 The current and projected service area for the stormwater management program or stormwater management system (Section 403.9302(3)(c), F.S.)

Rather than providing detailed legal descriptions or maps, this part of the template is exception-based. In this regard, if the stormwater service area is less than or extends beyond the geographic limits of your jurisdiction, please explain.

Similarly, if your service area is expected to change within the 20-year horizon, please describe the changes (*e.g.,* the expiration of an interlocal agreement, introduction of an independent special district, *etc.*).

Proceed to Part 5

Part 5.0 The current and projected cost of providing services calculated in 5-year increments (Section 403.9302(3)(d), F.S.)

Given the volume of services, jurisdictions should use the template's service groupings rather than reporting the current and projected cost of each individual service. Therefore, for the purposes of this document, "services" means:

1. Routine operation and maintenance (inclusive of the items listed in Part 1.3 of this document, ongoing administration, and non-structural programs)
2. Expansion (that is, improvement) of a stormwater management system.

Expansion means new work, new projects, retrofitting, and significant upgrades. Within the template, there are four categories of expansion projects

1. Flood protection, addressed in parts 5.2 and 5.3… this includes capital projects intended for flood protection/flood abatement
2. Water quality, addressed in part 5.2 and 5.3… this includes stormwater projects related to water quality improvement, such as BMAPs; projects to benefit natural systems through restoration or enhancement; and stormwater initiatives that are part of aquifer recharge projects
3. Resiliency, addressed in part 5.4… this includes all major stormwater initiatives that are developed specifically to address the effects of climate change, such as sea level rise and increased flood events
4. End of useful life replacement projects, addressed in part 6.0… this includes major expenses associated with the replacement of aging infrastructure

While numbers 3 and 4 have components that would otherwise fit into the first two categories, they are separately treated given their overall importance to the Legislature and other policymakers.

Expansion projects are further characterized as currently having either a committed funding source or no identified funding source. Examples of a committed funding source include the capacity to absorb the project's capital cost within current budget levels or forecasted revenue growth; financing that is underway or anticipated (bond or loan); known state or federal funding (appropriation or grant); special assessment; or dedicated cash reserves for future expenditure.

All answers should be based on local fiscal years (LFY, beginning October 1 and running through September 30). Please use nominal dollars for each year, but include any expected cost increases for inflation or population growth. Please check the EDR website for optional growth rate schedules that may be helpful.

If you have more than 5 projects in a particular category, please use the "Additional Projects" tab. There, you can use dropdown lists to choose the project category and whether there is a committed funding source, then enter the project name and expenditure amounts.

Part 5.1 Routine Operation and Maintenance

Please complete the table below, indicating the cost of operation and maintenance activities for the current year and subsequent five-year increments throughout the 20-year horizon. Your response to this part should exclude future initiatives associated with resiliency or major expenses associated with the replacement of aging infrastructure; these activities are addressed in subparts 5.4 and 6.0. However, do include non-structural programs like public outreach and education in this category.

If specific cost data is not yet available for the current year, the most recent (2020-21) O&M value can be input into the optional growth rate schedules (available on EDR's website as an Excel workbook). The most recent O&M value can be grown using the provided options for inflation, population growth, or some other metric of your choosing. If the growth in your projected total O&M costs is more than 15% over any five-year increment, please provide a brief explanation of the major drivers.

Routine Operation and Maintenance

	Expenditures (in $thousands)				
	LFY 2021-2022	2022-23 to 2026-27	2027-28 to 2031-32	2032-33 to 2036-37	2037-38 to 2041-42
Operation and Maintenance Costs					
Brief description of growth greater than 15% over any 5-year period:					

Part 5.2 Future Expansion (Committed Funding Source)

Please list expansion projects and their associated costs for the current year and subsequent five-year increments throughout the 20-year planning horizon. In this section, include stormwater system expansion projects or portions of projects with a committed funding source. If you include a portion of a project that is not fully funded, the project's remaining cost must be included in part 5.3, Expansion Projects with No Identified Funding Source.

Though many, if not most, stormwater projects benefit both flood protection and water quality, please use your best judgment to either allocate costs or simply select the primary purpose from the two categories below.

5.2.1 Flood Protection (Committed Funding Source): Provide a list of all scheduled new work, retrofitting and upgrades related to flood protection/flood abatement. Include infrastructure such as storage basins, piping and other conveyances, land purchases for stormwater projects, *etc* . Also include major hardware purchases such as vactor/jet trucks.

5.2.2 Water Quality Projects (Committed Funding Source): Please provide a list of scheduled water quality projects in your jurisdiction, such as treatment basins, alum injection systems, green infrastructure, water quality retrofits, *etc.,* that have a direct stormwater component. The projected expenditures should reflect only those costs.

- If you are party to an adopted BMAP, please include the capital projects associated with stormwater in this table. Include BMAP project number, cost to your jurisdiction, and year(s) that capital improvement costs are to be incurred. For reference, DEP publishes a complete list of adopted BMAP projects as an appendix in their Annual STAR Report.

Expansion Projects with a Committed Funding Source

5.2.1 Flood Protection Expenditures (in $thousands)

Project Name	LFY 2021-2022	2022-23 to 2026-27	2027-28 to 2031-32	2032-33 to 2036-37	2037-38 to 2041-42

5.2.2 Water Quality Expenditures (in $thousands)

Project Name (or, if applicable, BMAP Project Number or ProjID)	LFY 2021-2022	2022-23 to 2026-27	2027-28 to 2031-32	2032-33 to 2036-37	2037-38 to 2041-42

Part 5.3 Future Expansion with No Identified Funding Source

Please provide a list of known expansion projects or anticipated need(s) without formal funding commitments(s), formal pledges, or obligations. If you included a portion of a project that was partially covered by a committed source in part 5.2 above, list the projects and their remaining costs below.

5.3.1 Future Flood Protection with No Identified Funding Source: Please provide a list of future flood protection/flood abatement projects, associated land purchases, or major hardware purchases that are needed in your jurisdiction over the next 20 years. Future needs may be based on Master Plans, Comprehensive Plan Elements, Water Control Plans, areas of frequent flooding, hydrologic and hydraulic modeling, public safety, increased frequency of maintenance, desired level of service, flooding complaints, *etc.*

5.3.2 Future Water Quality Projects with no Identified Funding Source: Please provide a list of future stormwater projects needed in your jurisdiction over the next 20 years that are primarily related to water quality issues. Future needs may be based on proximity to impaired waters or waters with total maximum daily loads (TMDLs), BMAPs, state adopted Restoration Plans, Alternative Restoration Plans, or other local water quality needs.

- If you are party to an adopted BMAP, please list capital projects associated with stormwater. Include BMAP project number, cost to your jurisdiction, and year(s) that capital improvement costs are to be incurred.
- List other future water quality projects, including those in support of local water quality goals as well as those identified in proposed (but not yet adopted) BMAPs.

Expansion Projects with No Identified Funding Source

5.3.1 Flood Protection Expenditures (in $thousands)

Project Name	LFY 2021-2022	2022-23 to 2026-27	2027-28 to 2031-32	2032-33 to 2036-37	2037-38 to 2041-42

5.3.2 Water Quality Expenditures (in $thousands)

Project Name (or, if applicable, BMAP Project Number or ProjID)	LFY 2021-2022	2022-23 to 2026-27	2027-28 to 2031-32	2032-33 to 2036-37	2037-38 to 2041-42

Please indicate which resources or documents you used to complete table 5.3 (check all that apply).

- ☐ Stormwater Master Plan
- ☐ Basin Studies or Engineering Reports
- ☐ Adopted BMAP
- ☐ Adopted Total Maximum Daily Load
- ☐ Regional or Basin-specific Water Quality Improvement Plan or Restoration Plan

Specify:

- ☐ Other(s):

Part 5.4 Stormwater projects that are part of resiliency initiatives related to climate change

Please list any stormwater infrastructure relocation or modification projects and new capital investments specifically needed due to sea level rise, increased flood events, or other adverse effects of climate change. When aggregating, include O&M costs for these future resiliency projects and investments in this table (not in part 5.1). If your jurisdiction participates in a Local Mitigation Strategy (LMS), also include the expenditures associated with your stormwater management system in this category (for example, costs identified on an LMS project list).

Resiliency Projects with a Committed Funding Source Expenditures (in $thousands)

Project Name	LFY 2021-2022	2022-23 to 2026-27	2027-28 to 2031-32	2032-33 to 2036-37	2037-38 to 2041-42

Resiliency Projects with No Identified Funding Source Expenditures (in $thousands)

Project Name	LFY 2021-2022	2022-23 to 2026-27	2027-28 to 2031-32	2032-33 to 2036-37	2037-38 to 2041-42

- Has a vulnerability assessment been completed for your jurisdiction's storm water system?
  - If no, how many facilities have been assessed?
- Does your jurisdiction have a long-range resiliency plan of 20 years or more?
  - If yes, please provide a link if available:
  - If no, is a planning effort currently underway?

Part 6.0 The estimated remaining useful life of each facility or its major components (Section 403.9302(3)(e), F.S.)

Rather than reporting the exact number of useful years remaining for individual components, this section is constructed to focus on infrastructure components that are targeted for replacement and will be major expenses within the 20-year time horizon. Major replacements include culverts and pipe networks, control structures, pump stations, physical/biological filter media, *etc* . Further, the costs of retrofitting when used in lieu of replacement (such as slip lining) should be included in this part. Finally, for the purposes of this document, it is assumed that open storage and conveyance systems are maintained (as opposed to replaced) and have an unlimited service life.

In order to distinguish between routine maintenance projects and the replacement projects to be included in this part, only major expenses are included here. A major expense is defined as any single replacement project greater than 5% of the jurisdiction's total O&M expenditures over the most recent five-year period (such as a project in late 2021 costing more than 5% of the O&M expenditures for fiscal years 2016-2017 to 2020-2021).

If you have more than 5 projects in a particular category, please use the "Additional Projects" tab. There, you can use dropdown lists to choose the project category and whether there is a committed funding source, then enter the project name and expenditure amounts.

End of Useful Life Replacement Projects with a Committed Funding Source

	Expenditures (in $thousands)				
Project Name	LFY 2021-2022	2022-23 to 2026-27	2027-28 to 2031-32	2032-33 to 2036-37	2037-38 to 2041-42

End of Useful Life Replacement Projects with No Identified Funding Source

	Expenditures (in $thousands)				
Project Name	LFY 2021-2022	2022-23 to 2026-27	2027-28 to 2031-32	2032-33 to 2036-37	2037-38 to 2041-42

Part 7.0 The most recent 5-year history of annual contributions to, expenditures from, and balances of any capital account for maintenance or expansion of any facility or its major components. (Section 403.9302(3)(f), F.S.)

This part of the template also addresses a portion of s. 403.9302(3)(g), F.S., by including historical expenditures. Many local governments refer to these as “actual” expenditures.

Consistent with expenditure projections, the jurisdiction’s actual expenditures are categorized into routine O&M, expansion, resiliency projects, and replacement of aging infrastructure. Additionally, the table includes space for reserve accounts. EDR’s interpretation of subparagraph 403.9302(3)(f), F.S., is that “capital account” refers to any reserve account developed specifically to cover future expenditures.

Note that for this table:

- Expenditures for local fiscal year 2020-21 can be estimated based on the most current information if final data is not yet available.
- Current Year Revenues include tax and fee collections budgeted for that fiscal year as well as unexpended balances from the prior year (balance forward or carry-over) unless they are earmarked for the rainy day or a dedicated reserve as explained in the following bullets.
- Bond proceeds should reflect only the amount expended in the given year.
- A reserve is a dedicated account to accumulate funds for a specific future expenditure.
- An all-purpose rainy day fund is a type of working capital fund typically used to address costs associated with emergencies or unplanned events.

The sum of the values reported in the "Funding Sources for Actual Expenditures" columns should equal the total "Actual Expenditures" amount. The cells in the "Funding Sources for Actual Expenditures" section will be highlighted red if their sum does not equal the "Actual Expenditures" total.

If you do not have a formal reserve dedicated to your stormwater system, please enter zero for the final two reserve columns.

Routine O&M

	Total	Funding Sources for Actual Expenditures					
	Actual Expenditures	Amount Drawn from Current Year Revenues	Amount Drawn from Bond Proceeds	Amount Drawn from Dedicated Reserve	Amount Drawn from All-Purpose Rainy Day Fund	Contributions to Reserve Account	Balance of Reserve Account
2016-17							
2017-18							
2018-19							
2019-20							
2020-21							

Expansion

	Total	Funding Sources for Actual Expenditures					
	Actual Expenditures	Amount Drawn from Current Year Revenues	Amount Drawn from Bond Proceeds	Amount Drawn from Dedicated Reserve	Amount Drawn from All-Purpose Rainy Day Fund	Contributions to Reserve Account	Balance of Reserve Account
2016-17							
2017-18							
2018-19							
2019-20							
2020-21							

Resiliency

	Total	Funding Sources for Actual Expenditures					
	Actual Expenditures	Amount Drawn from Current Year Revenues	Amount Drawn from Bond Proceeds	Amount Drawn from Dedicated Reserve	Amount Drawn from All-Purpose Rainy Day Fund	Contributions to Reserve Account	Balance of Reserve Account
2016-17							
2017-18							
2018-19							
2019-20							
2020-21							

Replacement of Aging Infrastructure

	Total	Funding Sources for Actual Expenditures					
	Actual Expenditures	Amount Drawn from Current Year Revenues	Amount Drawn from Bond Proceeds	Amount Drawn from Dedicated Reserve	Amount Drawn from All-Purpose Rainy Day Fund	Contributions to Reserve Account	Balance of Reserve Account
2016-17							
2017-18							
2018-19							
2019-20							
2020-21							

Part 8.0 The local government's plan to fund the maintenance or expansion of any facility or its major components. The plan must include historical and estimated future revenues and expenditures with an evaluation of how the local government expects to close any projected funding gap (Section 403.9302(3)(g), F.S.)

In this template, the historical data deemed necessary to comply with s. 403.9302(3)(g), F.S., was included in part 7.0. This part is forward looking and includes a funding gap calculation. The first two tables will be auto-filled from the data you reported in prior tables. To do this, EDR will rely on this template's working definition of projects with committed funding sources, *i.e.,* EDR assumes that all committed projects have committed revenues. Those projects with no identified funding source are considered to be unfunded. EDR has automated the calculation of projected funding gaps based on these assumptions.

Committed Funding Source	2022-23 to 2026-27	2027-28 to 2031-32	2032-33 to 2036-37	2037-38 to 2041-42
Maintenance	0	0	0	0
Expansion	0	0	0	0
Resiliency	0	0	0	0
Replacement/Aging Infrastructure	0	0	0	0
Total Committed Revenues (=Total Committed Projects)	0	0	0	0

No Identified Funding Source	2022-23 to 2026-27	2027-28 to 2031-32	2032-33 to 2036-37	2037-38 to 2041-42
Maintenance	0	0	0	0
Expansion	0	0	0	0
Resiliency	0	0	0	0
Replacement/Aging Infrastructure	0	0	0	0
Projected Funding Gap (=Total Non-Committed Needs)	0	0	0	0

For any specific strategies that will close or lessen a projected funding gap, please list them in the table below. For each strategy, also include the expected new revenue within the five-year increments.

Strategies for New Funding Sources	2022-23 to 2026-27	2027-28 to 2031-32	2032-33 to 2036-37	2037-38 to 2041-42
Total	0	0	0	0

Remaining Unfunded Needs	0	0	0	0

Additional Table Rows

Choose from the drop-down lists for Project Type and Funding Source Type, then fill in the project name and expenditure estimates.
Rows that are highlighted RED are either missing information in a "Project & Type Information" column or have zero expenditures.
Link to aggregated table to crosscheck category totals and uncategorized projects.

Project & Type Information			Expenditures (in $thousands)				
Project Type (Choose from dropdown list)	Funding Source Type (Choose from dropdown list)	Project Name	LFY 2021-2022	2022-23 to 2026-27	2027-28 to 2031-32	2032-33 to 2036-37	2037-38 to 2041-42

Project & Type Information			Expenditures (in $thousands)				
Project Type (Choose from dropdown list)	Funding Source Type (Choose from dropdown list)	Project Name	LFY 2021-2022	2022-23 to 2026-27	2027-28 to 2031-32	2032-33 to 2036-37	2037-38 to 2041-42

Project & Type Information			Expenditures (in $thousands)				
Project Type (Choose from dropdown list)	Funding Source Type (Choose from dropdown list)	Project Name	LFY 2021-2022	2022-23 to 2026-27	2027-28 to 2031-32	2032-33 to 2036-37	2037-38 to 2041-42

Project & Type Information			Expenditures (in $thousands)				
Project Type (Choose from dropdown list)	Funding Source Type (Choose from dropdown list)	Project Name	LFY 2021-2022	2022-23 to 2026-27	2027-28 to 2031-32	2032-33 to 2036-37	2037-38 to 2041-42

Project & Type Information			Expenditures (in $thousands)				
Project Type (Choose from dropdown list)	Funding Source Type (Choose from dropdown list)	Project Name	LFY 2021-2022	2022-23 to 2026-27	2027-28 to 2031-32	2032-33 to 2036-37	2037-38 to 2041-42

Project & Type Information			Expenditures (in $thousands)				
Project Type (Choose from dropdown list)	Funding Source Type (Choose from dropdown list)	Project Name	LFY 2021-2022	2022-23 to 2026-27	2027-28 to 2031-32	2032-33 to 2036-37	2037-38 to 2041-42

Project & Type Information			Expenditures				
Project Type	Funding Source Type		LFY 2021-2022	2022-23 to 2026-27	2027-28 to 2031-32	2032-33 to 2036-37	2037-38 to 2041-42
Expansion Projects, Flood Protection	Committed Funding Source	Aggregated Total	0	0	0	0	0
Expansion Projects, Water Quality	Committed Funding Source	Aggregated Total	0	0	0	0	0
Resiliency Projects	Committed Funding Source	Aggregated Total	0	0	0	0	0
End of Useful Life Replacement Projects	Committed Funding Source	Aggregated Total	0	0	0	0	0
Expansion Projects, Flood Protection	No Identified Funding Source	Aggregated Total	0	0	0	0	0
Expansion Projects, Water Quality	No Identified Funding Source	Aggregated Total	0	0	0	0	0
Resiliency Projects	No Identified Funding Source	Aggregated Total	0	0	0	0	0
End of Useful Life Replacement Projects	No Identified Funding Source	Aggregated Total	0	0	0	0	0

Total of Projects without Project Type and/or Funding Source Type	**0**	**0**	**0**	**0**	**0**

CREEKVIEW

COMMUNITY DEVELOPMENT DISTRICT

17C

CREEKVIEW COMMUNITY DEVELOPMENT DISTRICT

BOARD OF SUPERVISORS FISCAL YEAR 2021/2022 MEETING SCHEDULE

LOCATION

Carlton Construction, Inc., 4615 U.S. Highway 17, Suite 1, Fleming Island, Florida 32003

DATE	POTENTIAL DISCUSSION/FOCUS	TIME
October 26, 2021	Regular Meeting	9:30 A.M.
November 30, 2021	Regular Meeting	9:30 A.M.
January 25, 2022	Regular Meeting	9:30 A.M.
February 22, 2022	Regular Meeting	9:30 A.M.
March 22, 2022	Regular Meeting	9:30 A.M.
April 26, 2022	Regular Meeting	9:30 A.M..
May 24, 2022	Regular Meeting	9:30 A.M.
June 28, 2022	Regular Meeting	9:30 A.M.
July 26, 2022	Regular Meeting	9:30 A.M.
August 23, 2022	Public Hearing & Regular Meeting	9:30 A.M..
September 27, 2022	Regular Meeting	9:30 A.M.