

# **KD52**

**COMMUNITY DEVELOPMENT**

**DISTRICT No. 2**

**September 23, 2025**

**BOARD OF SUPERVISORS**

**SPECIAL MEETING AND**

**AUDIT COMMITTEE**

**MEETING AGENDA**

**KD52**

**COMMUNITY DEVELOPMENT DISTRICT**

**No. 2**

**AGENDA**

**LETTER**

**KD52 Community Development District No. 2**  
**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**

September 16, 2025

Board of Supervisors  
KD52 Community Development District No. 2

Dear Board Members:

The Board of Supervisors of the KD52 Community Development District No. 2 will hold a Special Meeting and Audit Committee Meeting on September 23, 2025 at 1:00 p.m., at RAW Space Collaborative, 6013 Wesley Grove Blvd., Building 2, Suite 208, Wesley Chapel, Florida 33544. The agenda is as follows:

1. Call to Order/Roll Call
2. Public Comments
3. Administration of Oath of Office to Elected Supervisor Laura Lindsey [Seat 4] (*the following will be provided under separate cover*)
  - A. Updates and Reminders: Ethics Training for Special District Supervisors and Form 1
  - B. Membership, Obligations and Responsibilities
  - C. Guide to Sunshine Amendment and Code of Ethics for Public Officers and Employees
  - D. Form 8B: Memorandum of Voting Conflict for County, Municipal and other Local Public Officers
4. Ratification of Resolution 2025-33, Electing and Removing Officers of the District and Providing for an Effective Date
5. Consideration of Resolution 2025-42, Making Certain Findings; Approving the Supplemental Assessment Report; Setting Forth the Terms of the Series 2025 Bonds; Confirming the Maximum Assessment Lien Securing the Series 2025 Bonds; Levying and Allocating Assessments Securing Series 2025 Bonds; Addressing Collection of the Same; Providing for the Application of True-Up Payments; Providing for a Supplement to the Improvement Lien Book; Providing for the Recording of a Notice of Special Assessments; and Providing for Conflicts, Severability, and an Effective Date
6. Recess Regular Meeting/Commencement of Audit Selection Committee Meeting
7. Review of Responses to Request for Proposals (RFP) for Annual Audit Services

**ATTENDEES:**

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

- A. Affidavit of Publication
  - B. RFP Package
  - C. Respondent(s)
    - I. Berger, Toombs, Elam, Gaines & Frank
    - II. Grau & Associates
  - D. Auditor Evaluation Matrix/Ranking
8. Termination of Audit Selection Committee Meeting/Reconvene Regular Meeting
  9. Consider Recommendation of Audit Selection Committee
    - Award of Contract
  10. Consideration of Response(s) to Request for Qualifications (RFQ) for Engineering Services
    - A. Affidavit of Publication
    - B. RFQ Package
    - C. Respondents
      - I. Alliant Engineering, Inc.
      - II. Clearview Land Design, P.L.
      - III. Lighthouse Engineering, Inc.
    - D. Competitive Selection Criteria/Ranking
    - E. Award of Contract
  11. Consideration of Resolution 2025-22, Designating the Location of the Local District Records Office and Providing an Effective Date
  12. Acceptance of Unaudited Financial Statements as of August 31, 2025
  13. Approval of July 8, 2025 Special Meeting Minutes
  14. Staff Reports
    - A. District Counsel: *Kutak Rock LLP*
    - B. District Engineer (Interim): *Clearview Land Design, P.L.*
    - C. District Manager: *Wrathell, Hunt and Associates, LLC*
      - NEXT MEETING DATE: October 21, 2025 at 1:00 PM

○ QUORUM CHECK

SEAT 1	TOLLY KRUSEN	<input type="checkbox"/>	IN PERSON	<input type="checkbox"/>	PHONE	<input type="checkbox"/>	NO
SEAT 2	LANE GARDNER	<input type="checkbox"/>	IN PERSON	<input type="checkbox"/>	PHONE	<input type="checkbox"/>	NO
SEAT 3	MATTHEW JOSEY	<input type="checkbox"/>	IN PERSON	<input type="checkbox"/>	PHONE	<input type="checkbox"/>	NO
SEAT 4	LAURA LINDSEY	<input type="checkbox"/>	IN PERSON	<input type="checkbox"/>	PHONE	<input type="checkbox"/>	NO
SEAT 5	TRAVIS LOXTON	<input type="checkbox"/>	IN PERSON	<input type="checkbox"/>	PHONE	<input type="checkbox"/>	NO

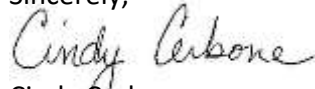
15. Board Members' Comments/Requests

16. Public Comments

17. Adjournment

If you should have any questions or concerns, please do not hesitate to contact me directly at (561) 346-5294.

Sincerely,



Cindy Cerbone  
District Manager

**FOR BOARD MEMBERS AND STAFF TO ATTEND BY TELEPHONE**  
**CALL-IN NUMBER: 1-888-354-0094**  
**PARTICIPANT PASSCODE: 801 901 3513**

**KD52**

**COMMUNITY DEVELOPMENT DISTRICT**

**No. 2**

**3**

**KD52 COMMUNITY DEVELOPMENT DISTRICT NO. 2  
BOARD OF SUPERVISORS  
OATH OF OFFICE**

I, \_\_\_\_\_, A CITIZEN OF THE STATE OF FLORIDA AND OF THE UNITED STATES OF AMERICA, AND BEING EMPLOYED BY OR AN OFFICER KD52 COMMUNITY DEVELOPMENT DISTRICT NO. 2 AND A RECIPIENT OF PUBLIC FUNDS AS SUCH EMPLOYEE OR OFFICER, DO HEREBY SOLEMNLY SWEAR OR AFFIRM THAT I WILL SUPPORT THE CONSTITUTION OF THE UNITED STATES AND OF THE STATE OF FLORIDA.

\_\_\_\_\_  
Board Supervisor

ACKNOWLEDGMENT OF OATH BEING TAKEN

STATE OF FLORIDA  
COUNTY OF \_\_\_\_\_

The foregoing oath was administered before me by means of  physical presence or  online notarization on this \_\_\_\_ day of \_\_\_\_\_, 20\_\_, by \_\_\_\_\_, who is personally known to me or has produced \_\_\_\_\_ as identification, and is the person described in and who took the aforementioned oath as a Member of the Board of Supervisors of KD52 Community Development District No. 2 and acknowledged to and before me that he/she took said oath for the purposes therein expressed.

(NOTARY SEAL)

\_\_\_\_\_  
Notary Public, State of Florida  
Print Name: \_\_\_\_\_  
Commission No.: \_\_\_\_\_ Expires: \_\_\_\_\_

-----  
MAILING ADDRESS:  Home  Office County of Residence \_\_\_\_\_

\_\_\_\_\_  
Street Phone Fax

\_\_\_\_\_  
City, State, Zip Email Address

**KD52**

**COMMUNITY DEVELOPMENT DISTRICT**

**No. 2**

**4**

**RESOLUTION 2025-33**

**A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE KD52 COMMUNITY DEVELOPMENT DISTRICT NO. 2 ELECTING AND REMOVING OFFICERS OF THE DISTRICT, AND PROVIDING FOR AN EFFECTIVE DATE**

**WHEREAS**, the KD52 Community Development District No. 2 (“District”) is a local unit of special-purpose government created and existing pursuant to Chapter 190, Florida Statutes; and

**WHEREAS**, the District’s Board of Supervisors desires to elect and remove certain Officers of the District.

**NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE KD52 COMMUNITY DEVELOPMENT DISTRICT NO. 2:**

**SECTION 1.** The following is/are elected as Officer(s) of the District effective April 15, 2025:

Howard Lane Gardner is elected Chair

Tolly Krusen is elected Vice Chair

Matthew Josey is elected Assistant Secretary

Laura Lindsey is elected Assistant Secretary

Travis Loxton is elected Assistant Secretary

Chris Conti is elected Assistant Secretary

**SECTION 2.** The following Officer(s) shall be removed as Officer(s) as of April 15, 2025:

\_\_\_\_\_

**SECTION 3.** The following prior appointments by the Board remain unaffected by this Resolution:

Craig Wrathell is Secretary

Cindy Cerbone is Assistant Secretary

Craig Wrathell is Treasurer

Jeff Pinder is Assistant Treasurer

**PASSED AND ADOPTED** this 15th day of April, 2025.

ATTEST:

**KD52 COMMUNITY  
DEVELOPMENT DISTRICT NO. 2**

  
\_\_\_\_\_  
Secretary/Assistant Secretary

  
\_\_\_\_\_  
Chair/Vice Chair, Board of Supervisors

**KD52**

**COMMUNITY DEVELOPMENT DISTRICT**

**No. 2**

**5**

**RESOLUTION 2025-42**

**A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE KD52 COMMUNITY DEVELOPMENT DISTRICT NO. 2 MAKING CERTAIN FINDINGS; APPROVING THE SUPPLEMENTAL ASSESSMENT REPORT; SETTING FORTH THE TERMS OF THE SERIES 2025 BONDS; CONFIRMING THE MAXIMUM ASSESSMENT LIEN SECURING THE SERIES 2025 BONDS; LEVYING AND ALLOCATING ASSESSMENTS SECURING SERIES 2025 BONDS; ADDRESSING COLLECTION OF THE SAME; PROVIDING FOR THE APPLICATION OF TRUE-UP PAYMENTS; PROVIDING FOR A SUPPLEMENT TO THE IMPROVEMENT LIEN BOOK; PROVIDING FOR THE RECORDING OF A NOTICE OF SPECIAL ASSESSMENTS; AND PROVIDING FOR CONFLICTS, SEVERABILITY, AND AN EFFECTIVE DATE.**

**WHEREAS**, the KD52 Community Development District No. 2 ("**District**") has previously indicated its intention to undertake, install, establish, construct, or acquire certain public infrastructure improvements and to finance such public infrastructure improvements through the imposition of special assessments on benefitted property within the District and the issuance of bonds; and

**WHEREAS**, the District's Board of Supervisors ("**Board**") has previously adopted, after notice and public hearing, Resolution 2025-35, relating to the imposition, levy, collection, and enforcement of such special assessments; and

**WHEREAS**, pursuant to and consistent with the terms of Resolution 2025-35, this Resolution shall set forth the terms of bonds to be issued by the KD52 Community Development District No. 1 ("**District No. 1**"), pursuant to that certain *Interlocal Agreement Between KD52 Community Development District No. 1 and KD52 Community Development District No. 2 Regarding the Financing, Construction and Maintenance of Certain Improvements*, dated May 9, 2025, and Resolution 2025-41, adopted by the District Board on July 8, 2025, and apply the adopted special assessment methodology to the actual scope of the project to be completed with such series of bonds and the terms of the bond issue; and

**WHEREAS**, on September 17, 2025, District No. 1 entered into a Bond Purchase Agreement whereby it agreed to sell its \$40,475,000 Special Assessment Revenue Bonds, Series 2025 (the "**Series 2025 Bonds**"); and

**WHEREAS**, pursuant to and consistent with Resolution 2025-35, the District desires to set forth the particular terms of the sale of the Series 2025 Bonds and confirm the levy of special assessments securing the Series 2025 Bonds (the "**Series 2025 Assessments**").

**NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE KD52 COMMUNITY DEVELOPMENT DISTRICT NO. 2 AS FOLLOWS:**

**SECTION 1. AUTHORITY FOR THIS RESOLUTION.** This Resolution is adopted pursuant to the provisions of Florida law, including without limitation Chapters 170, 190, and 197, *Florida Statutes*, and Resolution 2025-35.

**SECTION 2. MAKING CERTAIN FINDINGS; APPROVING THE ENGINEER'S REPORT AND SUPPLEMENTAL ASSESSMENT REPORT.** The Board of Supervisors of the KD52 Community Development District No. 2 hereby finds and determines as follows:

(a) On April 15, 2025, the District, after due notice and public hearing, adopted Resolution 2025-35, which, among other things, equalized, approved, confirmed, and levied special assessments on property benefitting from the infrastructure improvements authorized by the District. That Resolution provided that as each series of bonds were issued to fund all or any portion of the District's infrastructure improvements a supplemental resolution would be adopted to set forth the specific terms of the bonds and to certify the amount of the lien of the special assessments securing any portion of the bonds, including interest, costs of issuance, the number of payments due, the true-up amounts, and the application of receipt of true-up proceeds.

(b) The *Supplemental Engineer's Report*, dated August 2025, attached to this Resolution as **Exhibit A** (the "**Engineer's Report**"), identifies and describes the presently expected components of the improvements to be financed in part with the Series 2025 Bonds (the "**2025 Project**"). The District hereby confirms that the improvements serve a proper, essential, and valid public purpose. The use of the Engineer's Report in connection with the sale of the Series 2025 Bonds is hereby ratified.

(c) The *Final First Supplemental Special Assessment Methodology Report*, dated September 17, 2025, attached to this Resolution as **Exhibit B** (the "**Supplemental Assessment Report**"), applies the adopted *Master Special Assessment Methodology Report*, dated March 4, 2025 (the "**Master Assessment Report**"), to the 2025 Project and the actual terms of the Series 2025 Bonds. The Supplemental Assessment Report is hereby approved, adopted, and confirmed. The District ratifies its use in connection with the sale of the Series 2025 Bonds.

(d) The 2025 Project will specially benefit all developable property within the District as set forth in the Supplemental Assessment Report. It is reasonable, proper, just, and right to assess the portion of the costs of the 2025 Project financed with the Series 2025 Bonds to the specially benefitted properties within the District as set forth in Supplemental Assessment Report, Resolution 2025-35 and this Resolution.

**SECTION 3. SETTING FORTH THE TERMS OF THE SERIES 2025 BONDS; CONFIRMING THE MAXIMUM ASSESSMENT LIEN SECURING THE SERIES 2025 BONDS.** As provided in Resolution 2025-35, this Resolution is intended to set forth the terms of the Series 2025 Bonds and the final amount of the lien of the Series 2025 Assessments securing those bonds. The Series 2025 Bonds shall bear such rates of interest and mature on such dates as shown on **Exhibit C** attached hereto. The sources and uses of funds of the Series 2025 Bonds shall be as set forth in **Exhibit D**. The

debt service due on the Series 2025 Bonds is set forth on **Exhibit E** attached hereto. The lien of the Series 2025 Assessments securing the Series 2025 Bonds shall be the principal amount due on the Series 2025 Bonds, together with accrued but unpaid interest thereon, and together with the amount by which the annual assessments shall be grossed up to include early payment discounts required by law and costs of collection.

**SECTION 4. LEVYING AND ALLOCATING THE SERIES 2025 ASSESSMENTS SECURING THE SERIES 2025 BONDS; ADDRESSING COLLECTION OF THE SAME.**

(a) The Series 2025 Assessments securing the Series 2025 Bonds shall be levied and allocated in accordance with **Exhibit B**. The Supplemental Assessment Report is consistent with the District’s Master Assessment Report. The Supplemental Assessment Report, considered herein, reflects the actual terms of the issuance of the Series 2025 Bonds. The estimated costs of collection of the Series 2025 Assessments for the Series 2025 Bonds are as set forth in the Supplemental Assessment Report.

(b) To the extent that land is added to the District, the District may, by supplemental resolution at a regularly noticed meeting and without the need for a public hearing on reallocation, determine such land to be benefitted by the 2025 Project and reallocate the Series 2025 Assessments securing the Series 2025 Bonds in order to impose Series 2025 Assessments on the newly added and benefitted property.

(c) Taking into account capitalized interest and earnings on certain funds and accounts as set forth in the Master Trust Indenture and First Supplemental Trust Indenture, the District shall begin annual collection of Series 2025 Assessments using the methods available to it by law.

(d) The District hereby certifies the Series 2025 Assessments for collection and directs staff to take all actions necessary to meet the time and other deadlines imposed for collection by Pasco County and other Florida law. The District’s Board each year shall adopt a resolution addressing the manner in which the Series 2025 Assessments shall be collected for the upcoming fiscal year. The decision to collect Series 2025 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 Series 2025 Assessments in future years, and the District reserves the right in its sole discretion to select collection methods in any given year, regardless of past practices.

**SECTION 5. CALCULATION AND APPLICATION OF TRUE-UP PAYMENTS.** The terms of Resolution 2025-35 addressing True-Up Payments, as defined therein and as described in more detail in the Supplemental Assessment Report and True-Up Agreement between the District and the landowner, shall continue to apply in full force and effect.

**SECTION 6. IMPROVEMENT LIEN BOOK.** Immediately following the adoption of this Resolution, the Series 2025 Assessments as reflected herein shall be recorded by the Secretary of the Board of the District in the District’s Improvement Lien Book. The Series 2025 Assessments

against each respective parcel shall be and shall remain a legal, valid and binding first lien on such parcels until paid and such lien shall be 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.

**SECTION 7. ASSESSMENT NOTICE.** The District’s Secretary is hereby directed to record a Notice of Series 2025 Assessments securing the Series 2025 Bonds in the Official Records of Pasco County, Florida, or such other instrument evidencing the actions taken by the District.

**SECTION 8. CONFLICTS.** This Resolution is intended to supplement Resolution 2025-35, which remains in full force and effect. This Resolution and Resolution 2025-35 shall be construed to the maximum extent possible to give full force and effect to the provisions of each resolution. All District resolutions or parts thereof in actual conflict with this Resolution are, to the extent of such conflict, superseded and repealed.

**SECTION 9. SEVERABILITY.** If any section or part of a section of this Resolution be 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.

**SECTION 10. EFFECTIVE DATE.** This Resolution shall become effective upon its adoption.

**APPROVED** and **ADOPTED**, this 23<sup>rd</sup> day of September, 2025.

ATTEST:

**KD52 COMMUNITY  
DEVELOPMENT DISTRICT NO. 2**

\_\_\_\_\_  
Secretary/Assistant Secretary

\_\_\_\_\_  
Chair/Vice Chair Board of Supervisors

**Exhibit A:** *Supplemental Engineer’s Report*, dated August 2025

**Exhibit B:** *Final First Supplemental Special Assessment Methodology Report*, dated September 17, 2025

**Exhibit C:** Maturities and Coupon of Series 2025 Bonds

**Exhibit D:** Sources and Uses of Funds for Series 2025 Bonds

**Exhibit E:** Annual Debt Service Payment Due on Series 2025 Bonds

**EXHIBIT A**

*Supplemental Engineer's Report, dated August 2025*

**SUPPLEMENTAL ENGINEER'S REPORT**

**PREPARED FOR:**

**BOARD OF SUPERVISORS  
KD52 Community Development District No. 1 &  
KD52 Community Development District No. 2**

**ENGINEER:**

**CLEARVIEW LAND DESIGN, P.L.  
3010 W. Azeele St., Suite 150  
Tampa, FL 33609**

**August 2025**

**KD52 COMMUNITY DEVELOPMENT DISTRICT NO. 1 & NO. 2**

**SUPPLEMENTAL ENGINEER'S REPORT**

**1. INTRODUCTION**

The purpose of this report is to provide a description of the capital improvement plan ("CIP") and estimated costs of the CIP, for the KD52 Community Development District No. 1 ("District No. 1") and No. 2 ("District No. 2" and together with District No. 1, the "Districts").

**2. GENERAL SITE DESCRIPTION**

The Districts consist of approximately 789 acres of land (District No. 1 consisting of approximately 442 acres and District No. 2 consisting of approximately 347 acres) and are located entirely within Pasco County, Florida (the "County"). The site is generally located on the northwest corner of State Road 52 and Interstate 75.

**3. PROPOSED CAPITAL IMPROVEMENT PLAN**

The CIP is intended to provide public infrastructure improvements for the Districts. The following chart shows the planned product types for the District:

**PRODUCT TYPES – District No. 1**

<b>Product Type</b>	<b>Product Size</b>	<b>Total Units / Area</b>	<b>Area</b>
Single Family Detached	35' wide	226	47 Ac.
Single Family Detached	50' wide	333	103 Ac.
Townhouses (For Rent)		200	30 Ac.
Townhouses (Fee Simple)		30	5 Ac.
Multi-Family Apartments		680	22 Ac.
Commercial/Retail		20,000 SF	2 Ac.
<b>Totals</b>		<b>1,469 Units / 20,000 SF</b>	

**PRODUCT TYPES – District No. 2**

<b>Product Type</b>	<b>Product Size</b>	<b>Total Units / Area</b>	<b>Area</b>
Townhouses (Fee Simple)		24	7 Ac.
Commercial/Retail		235,000 SF	45 Ac.
Light Industrial		1,900,000	175 Ac.
<b>Totals</b>		<b>24 Units / 2,135,000 SF</b>	

The public infrastructure for the CIP is as follows:

**Roadway Improvements:**

The CIP includes internal, local roads ("local roads") and collector roads within the District. Generally, all local roads will be 2-lane un-divided roads. Collector roads will be a combination of 4-lane divided and 2-lane undivided roads. All roads include the roadway asphalt, base, and subgrade, roadway curb and gutter, striping and signage, roadway parking, and sidewalks within rights-of-way abutting non-lot lands. Sidewalks abutting lots will be constructed by the homebuilders on all subdivision roads. All roads will be designed in accordance with County standards.

Both local roads and collector roads may be financed by the District. The District anticipates owning and operating all local roads within the District. The County will own Old Pasco Road and Pasco Road, which are the main north-south and east-west County collector roads that bisect the Districts. Alternatively, the landowner may elect to finance directly or provide an alternate source of funding for the internal local roads, gate them, and turn them over to a homeowner's association for ownership, operation and maintenance (in such an event, the Districts would be limited to financing only utilities, conservation/mitigation and stormwater improvements behind such gated areas).

**Stormwater Management System:**

The stormwater collection and outfall system is a combination of roadway curbs, curb inlets, drainage pipe, control structures and open lakes designed to treat and attenuate stormwater runoff from lands within the Districts. The stormwater system will be designed consistent with the applicable design requirements for stormwater/floodplain management systems. District No. 1 will finance, own, operate and maintain the stormwater system.

NOTE: No private earthwork is included in the CIP.

**Water and Wastewater Utilities:**

As part of the CIP, the Districts intend to construct and/or acquire water and wastewater infrastructure. In particular, the on-site water supply improvements include water mains that will be located within rights-of-way and used for potable water service and fire protection. Wastewater improvements for the CIP will include an onsite gravity collection system, offsite and onsite force main and onsite lift stations.

The water and wastewater collection systems for the Districts will be constructed and/or acquired by the Districts and then dedicated to a local, public utility provider for operation and maintenance. The CIP will only include laterals to the lot lines (i.e., point of connection).

### **Perimeter Hardscape, Landscape, and Irrigation:**

The Districts will construct and/or install landscaping, irrigation and hardscaping outside of any gated areas. Such improvements will, at a minimum, meet or exceed any local design requirements.

All such perimeter landscaping, irrigation and hardscaping will be owned, maintained and funded by the Districts. Such infrastructure, to the extent that it is located in rights-of-way outside of the boundaries of the Districts and owned by a local general purpose government, will be maintained pursuant to a right-of-way agreement or permit. Any landscaping, irrigation or hardscaping systems located within gated areas would not be financed by District No. 1 and instead would be privately installed and maintained.

### **Streetlights / Undergrounding of Electrical Utility Lines**

The Districts intends to lease street lights through an agreement with a local utility provider and will fund the street lights through an annual operations and maintenance assessment. As such, streetlights are not included as part of the CIP.

The CIP does however include the incremental cost of undergrounding of electrical utility lines within right-of-way utility easements throughout the community. Any lines and transformers located in such areas would be owned by the local utility provider and not paid for by the District as part of the CIP.

### **Recreational Amenities:**

As part of the overall development, the landowner may privately fund a recreational clubhouse and other amenities, and, upon completion, transfer them to a homeowners' association for ownership, operation and maintenance. Such recreational amenities are not included in the CIP. Any such amenities are considered common elements for the exclusive benefit of the landowners.

### **Environmental Conservation/Mitigation**

The District will own and maintain existing, onsite conservation areas.

### **Off-Site Improvements**

Offsite improvements include water and wastewater main extensions along SR 52 and the existing portion of Old Pasco Road, improvements to State Road 52 and the extension of Pasco Road, including drainage and utility infrastructure, east of I-75.

NOTE: In the event that impact fee credits are generated, or cost sharing is available, from any roadway, utilities or other improvements funded by the District, any such credits, or cost-sharing, if any, will be the subject of an acquisition agreement between the applicable landowner and the Districts.

**Professional Services**

The CIP also includes various professional services. These include: (i) engineering, surveying and architectural fees, (ii) permitting and plan review costs, and (iii) development/construction management services fees that are required for the design, permitting, construction, and maintenance acceptance of the public improvements and community facilities.

**4. PERMITTING/CONSTRUCTION COMMENCEMENT**

All necessary permits for the construction of the CIP have either been obtained or are currently under review by respective governmental authorities, and include the following:

Project Name	Permit Description	Permit No.	Approval Date	Expiration Date
KD52 MPUD	MPUD	No. 7712	May 7, 2024	December 31, 2035
KD52 Phase 1	Master Water and Sewer Plan	PCU# 23-112.01.A.1	April 23, 2024	
SR 52 at Levi Loop/Old Tampa Bay Dr.	FDOT Access Management Review Committee (AMRC)	2023-A-798-00057	October 25, 2023	
Hines SR 52	Formal Wetlands Jurisdiction	43047110.001	September 22, 2023	October 6, 2028
Kinfield Phase 1 Spine Roads	Pasco County Site Permit	SITEPLN-2024-00213	June 26, 2025	
Kinfield Phase 1 Spine Roads	SWFWMD Environmental Resource Permit	908097/43041295.004	June 26, 2025	June 26, 2030
Kinfield Phase 1 Spine Roads	Pasco Utilities Letter of Commitment	PCU#23-112.02.A.1	February 20, 2025	February 19, 2026
Kinfield Phase 1 Spine Roads	FDEP Water System Permit	1801-51CW23-112.02	June 25, 2025	June 25, 2026
Kinfield Phase 1 Spine Roads	FDEP Wastewater System Permit	2074-51CS23-112.02	June 25, 2025	June 25, 2026
Kinfield Phase 1 Spine Roads	FDOT Access Permit	2023-A-798-00057	Pending	
Kinfield Phase 1 Spine Roads	FDOT Drainage Connection Permit	2023-D-798-00086	Pending	
Kinfield Phase 1 Spine Roads	FDOT Utility Connection Permit	Pending	Pending	
Kinfield Phase 1 Spine Roads	FDOT Construction Agreement	Pending	Pending	
Kinfield Phase 1 Spine Roads	SWFWMD ERP – SR 52 Improvements	909153	Pending	
Kinfield Phase 1 Spine Roads	Pasco Co. Signal Permit	ROW-2024-01036	Pending	

## 5. CIP COST ESTIMATE

The table below presents, among other things, a cost estimate for the CIP. It is our professional opinion that the costs set forth below are reasonable and consistent with market pricing.

### KD52 RESIDENTIAL COMMUNITY DEVELOPMENT DISTRICT ESTIMATED CAPITAL IMPROVEMENT COSTS

COST CATEGORY	TOTAL MASTER COSTS	MASTER PHASE 1 (2025 - 2027)	MASTER PHASE 2 (2027-2029)	TOTAL RESIDENTIAL COSTS	RESIDENTIAL PHASE 1 (2025 - 2027)	RESIDENTIAL PHASE 2 (2027-2029)	TOTAL (MASTER + RESIDENTIAL)
COLLECTOR ROADWAYS	\$8,330,000	\$6,300,000	\$2,030,000				\$8,330,000
WATER/WASTEWATER - MASTER INFRASTRUCTURE	\$3,530,000	\$2,760,000	\$770,000				\$3,530,000
STORMWATER MANAGEMENT, DRAINAGE & EARTHWORK (EXCLUDING LOTS)	\$9,210,000	\$7,200,000	\$2,010,000				\$9,210,000
LANDSCAPE, HARDSCAPE & IRRIGATION - MASTER ROADWAYS	\$4,910,000	\$1,211,553	\$3,698,447				\$4,910,000
RESIDENTIAL ROADS				\$16,500,000	\$11,000,000	\$5,500,000	\$16,500,000
WATER/WASTEWATER - RESIDENTIAL ROADS				\$11,000,000	\$7,330,000	\$3,670,000	\$11,000,000
LANDSCAPE, HARDSCAPE & IRRIGATION - RESIDENTIAL				\$5,000,000	\$3,330,000	\$1,670,000	\$5,000,000
UNDERGROUNDING UTILITIES - RESIDENTIAL							\$0
MULTI-FAMILY SPINE ROADWAY				\$1,000,000	\$1,000,000		\$1,000,000
OFFSITE ROADWAY - SR 52 IMPROVEMENTS	\$7,500,000	\$4,700,000	\$2,800,000				\$7,500,000
OFFSITE ROADWAY - ROAD AD EXTENSION	\$2,390,000		\$2,390,000				\$2,390,000
OFFSITE UTILITIES - OLD PASCO ROAD / SR 52 EXTENSIONS	\$6,840,000	\$6,840,000					\$6,840,000
OFFSITE UTILITIES - ROAD AD EXTENSION	\$264,000		\$264,000				\$264,000
UNDERGROUNDING UTILITIES - SPINE ROADS	\$3,710,000	\$2,900,000	\$810,000				\$3,710,000
SUBTOTAL	\$46,684,000	\$31,911,553	\$14,772,447	\$33,500,000	\$22,660,000	\$10,840,000	\$80,184,000
PERMITTING	\$150,000	\$120,000	\$30,000	\$200,000	\$100,000	\$100,000	\$350,000
PROFESSIONAL SERVICE PH 1	\$750,000	\$750,000					\$750,000
PROFESSIONAL SERVICES PH2 (10%)	\$2,165,400	\$0	\$2,165,400	\$3,350,000	\$2,266,000	\$1,084,000	\$5,515,400
Master Phase 1 Contingency (3%)	\$983,447	\$983,447					\$983,447
REMAING PHASES CONTINGENCY	\$2,006,553	\$0	\$2,006,553	\$5,025,000	\$3,399,000	\$1,626,000	\$7,031,553
<b>TOTAL</b>	<b>\$52,739,400</b>	<b>\$33,765,000</b>	<b>\$18,974,400</b>	<b>\$42,075,000</b>	<b>\$28,425,000</b>	<b>\$13,650,000</b>	<b>\$94,814,400</b>

- a. The probable costs estimated herein do not include anticipated carrying cost, interest reserves or other anticipated CDD expenditures that may be incurred.
- b. The landowner reserves the right to finance any of the improvements outlined above, and have such improvements owned and maintained by a property owner's or homeowner's association, in which case such items would not be part of the CIP or financed by the Districts.
- c. District No. 1 may enter into an agreement with a third-party, or an applicable property owner's or homeowner's association, to maintain any District-owned improvements, subject to the approval of the District's bond counsel.

## 6. MAINTENANCE RESPONSIBILITIES

The table below presents the ownership and maintenance responsibility for infrastructure in the CIP.

<b>Improvement</b>	<b>Financing Entity</b>	<b>Operation &amp; Maintenance Entity</b>
Collector Roadways	CDD	Pasco County
Master Water and Sewer Utilities	CDD	Pasco County
Stormwater Management, Drainage & Earthwork (excluding lots)	CDD	CDD
Landscape, Hardscape & Irrigation – Master Roadways	CDD	CDD
Residential Roads	CDD	CDD
Water / Wastewater – Residential Roads	CDD	Pasco County
Landscape, Hardscape & Irrigation – Residential Roadways	CDD	CDD
Multi-Family Spine Road	CDD	CDD
Offsite Roadway – SR 52 Improvements	CDD	FDOT
Offsite Roadway – Pasco Road	CDD	Pasco County
Offsite Water and Sewer – Old Pasco Road / SR 52 Extensions	CDD	Pasco County
Offsite Utilities – Pasco Road	CDD	Pasco County

## 7. CONCLUSIONS

The CIP will be designed in accordance with current governmental regulations and requirements. The CIP will serve its intended function so long as the construction is in substantial compliance with the design.

It is further our opinion that:

- The estimated cost to the CIP as set forth herein is reasonable based on prices currently being experienced in the jurisdiction in which the Districts are located, and is not greater than the lesser of the actual cost of construction or the fair market value of such infrastructure;
- All of the improvements comprising the CIP are required by applicable development approvals issued pursuant to Section 380.06, Florida Statutes;

- the CIP is feasible to construct, there are no technical reasons existing at this time that would prevent the implementation of the CIP, and it is reasonable to assume that all necessary regulatory approvals will be obtained in due course; and
- the assessable property within the District will receive a special benefit from the CIP that is at least equal to such costs.

Also, the CIP will constitute a system of improvements that will provide benefits, both general, and special and peculiar to all lands within the Districts. The general public, property owners outside of the Districts, and property outside the Districts will benefit from the provisions of the Districts' CIP; however, these are incidental to the Districts' CIP, which is designed solely to provide special benefits peculiar to property within the Districts. Special and peculiar benefits accrue to property within the Districts and enables properties within the Districts to be developed.

The CIP will be owned by the Districts or other governmental units and such CIP is intended to be available and will reasonably be available for use by the general public (either by being part of a system of improvements that is available to the general public or is otherwise available to the general public) including nonresidents of the Districts. All of the CIP is or will be located on lands owned or to be owned by the Districts or another governmental entity or on perpetual easements in favor of the Districts or other governmental entity. The CIP, and any cost estimates set forth herein, do not include any earthwork, grading or other improvements on private lots or property. The Districts will pay the lesser of the cost of the components of the CIP or the fair market value.

Please note that the CIP as presented herein is based on current plans and market conditions which are subject to change. Accordingly, the CIP, as used herein, refers to sufficient public infrastructure of the kinds described herein (i.e., stormwater/floodplain management, sanitary sewer, potable water, etc.) to support the development and sale of the planned residential units in the Districts, which (subject to true-up determinations) number and type of units may be changed with the development of the site. Stated differently, during development and implementation of the public infrastructure improvements as described for the Districts, it may be necessary to make modifications and/or deviations for the plans, and the District expressly reserves the right to do so.

This item has been digitally signed and sealed by  
BRIAN G. SURAK, P.E. on the date adjacent to the seal.  
Printed copies of this document are not considered signed  
and sealed and the signature must be verified on any  
electronic copies.

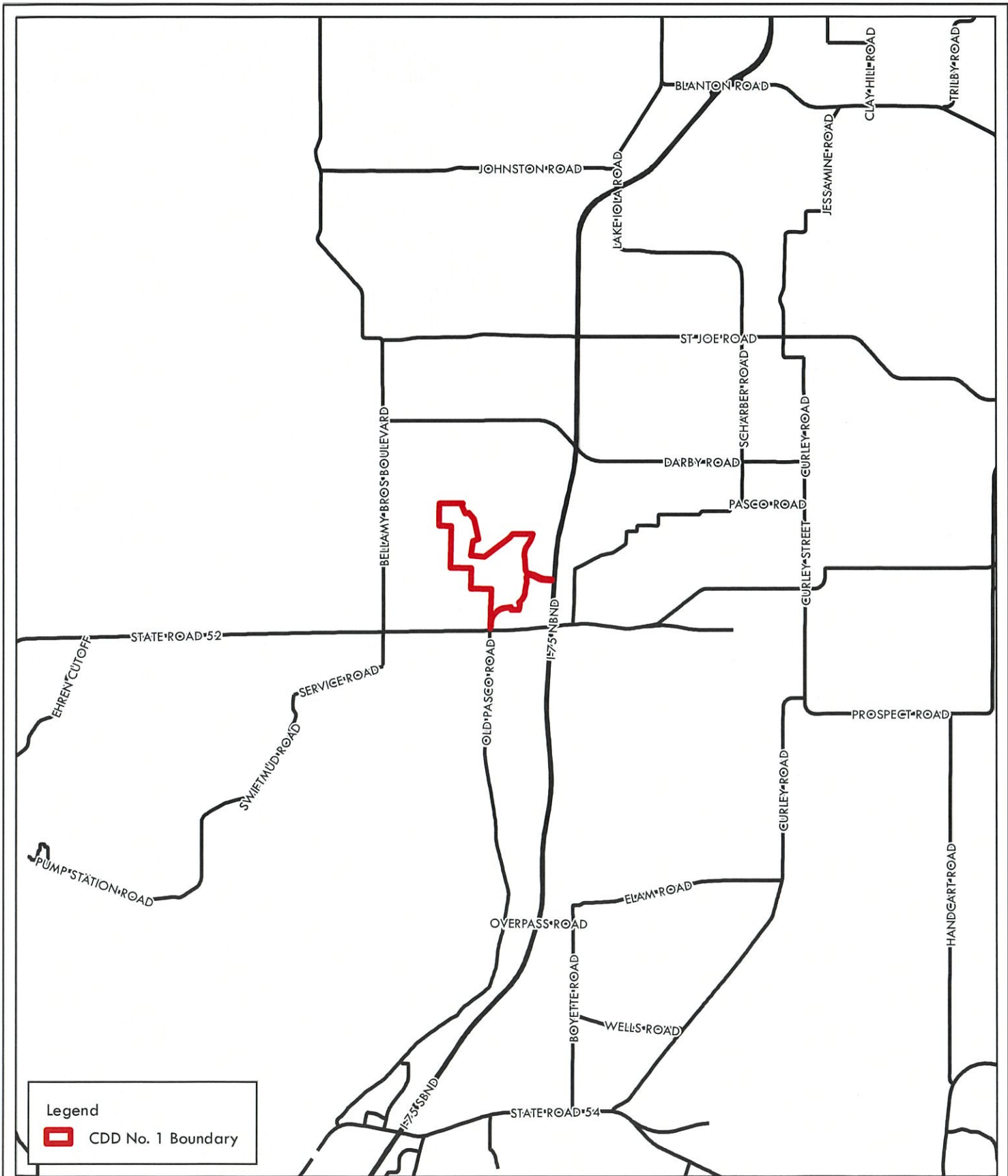
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Brian G. Surak, P.E.  
FL License No. 59064




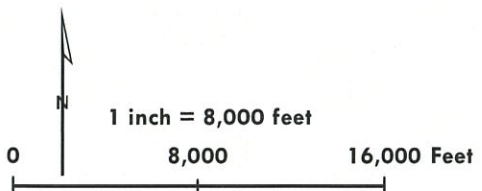
Digitally signed by  
Brian G. Surak  
Date: 2025.08.19  
13:33:26-04'00'

## **LOCATION MAP**



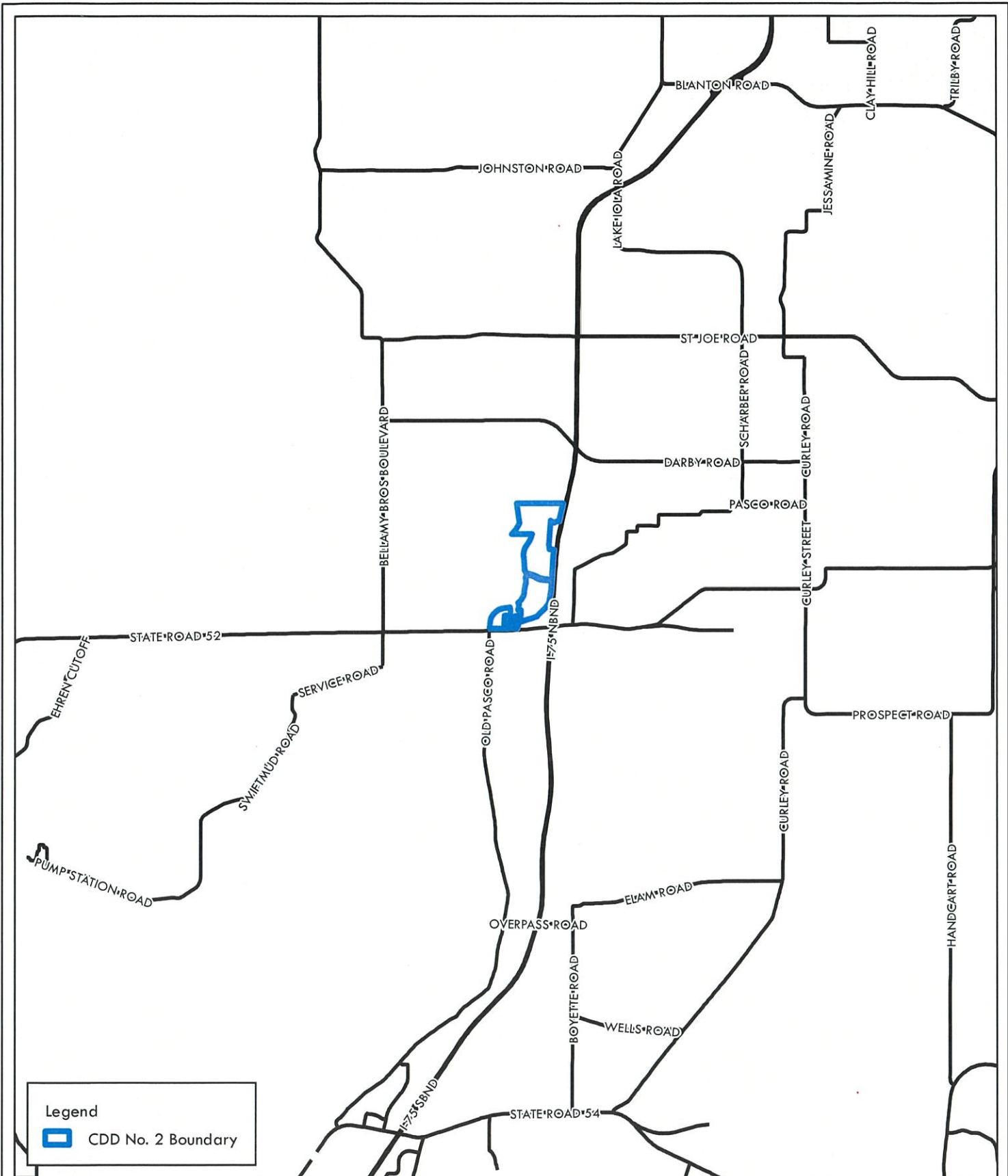
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 CDD No. 1 Boundary

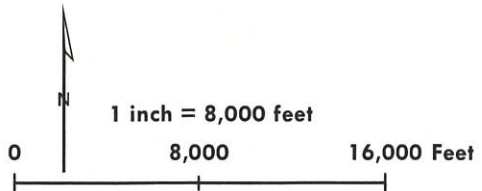


KD52 CDD No. 1  
Vicinity Map

 **Clearview**  
LAND DESIGN, P.L.  
3010 W. Azelee Street Suite 150  
Tampa, Florida 33609 (813) 223-3919



**Legend**  
 CDD No. 2 Boundary



**KD52 CDD No. 2**

Vicinity Map



**Clearview**  
 LAND DESIGN, P.L.  
 3010 W. Azelee Street Suite 150  
 Tampa, Florida 33609 (813) 223-3919

**CDD BOUNDARY MAP**


BRADLEY DRIVE

MILLER ROAD

IKE ROAD

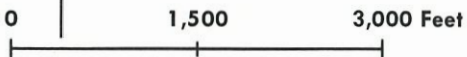


Legend

 CDD No. 1 Boundary



1 inch = 1,500 feet



KD52 CDD No. 1

Boundary Map



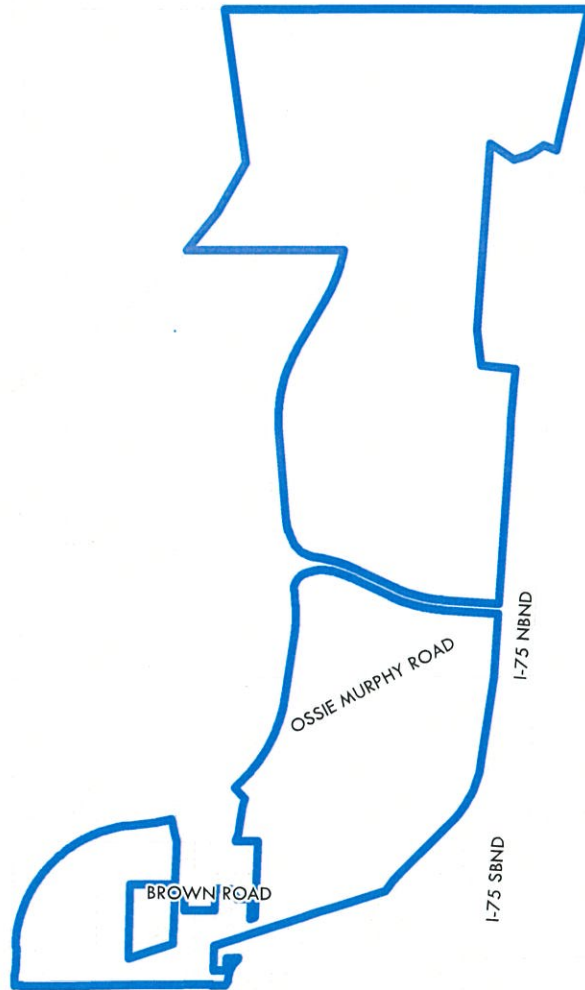
**Clearview**  
LAND DESIGN, P.L.

3010 W. Azelee Street Suite 150  
Tampa, Florida 33609 (813) 223-3919

MILLER ROAD  
IKE ROAD

DARBY ROAD

MCKENDREE LANE



RICE ROAD

STATE ROAD 52

RANCH HILL ROAD

OLD PASCO ROAD

PRINCEVILLE DRIVE

MOSHIE LANE

ZELLER AVENUE

BROWN ROAD

OSSIE MURPHY ROAD

I-75 SBND

RAMP  
RAMP


I-75 NBND

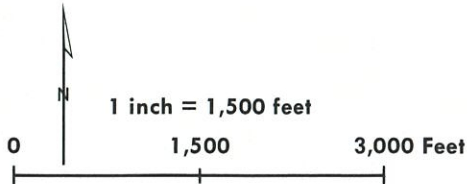
PASCO ROAD

FRESCO LANE

COMMERCE DRIVE

Legend

 CDD No. 2 Boundary



KD52 CDD No. 2

Boundary Map














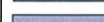
**Clearview**  
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## **SITE PLAN**

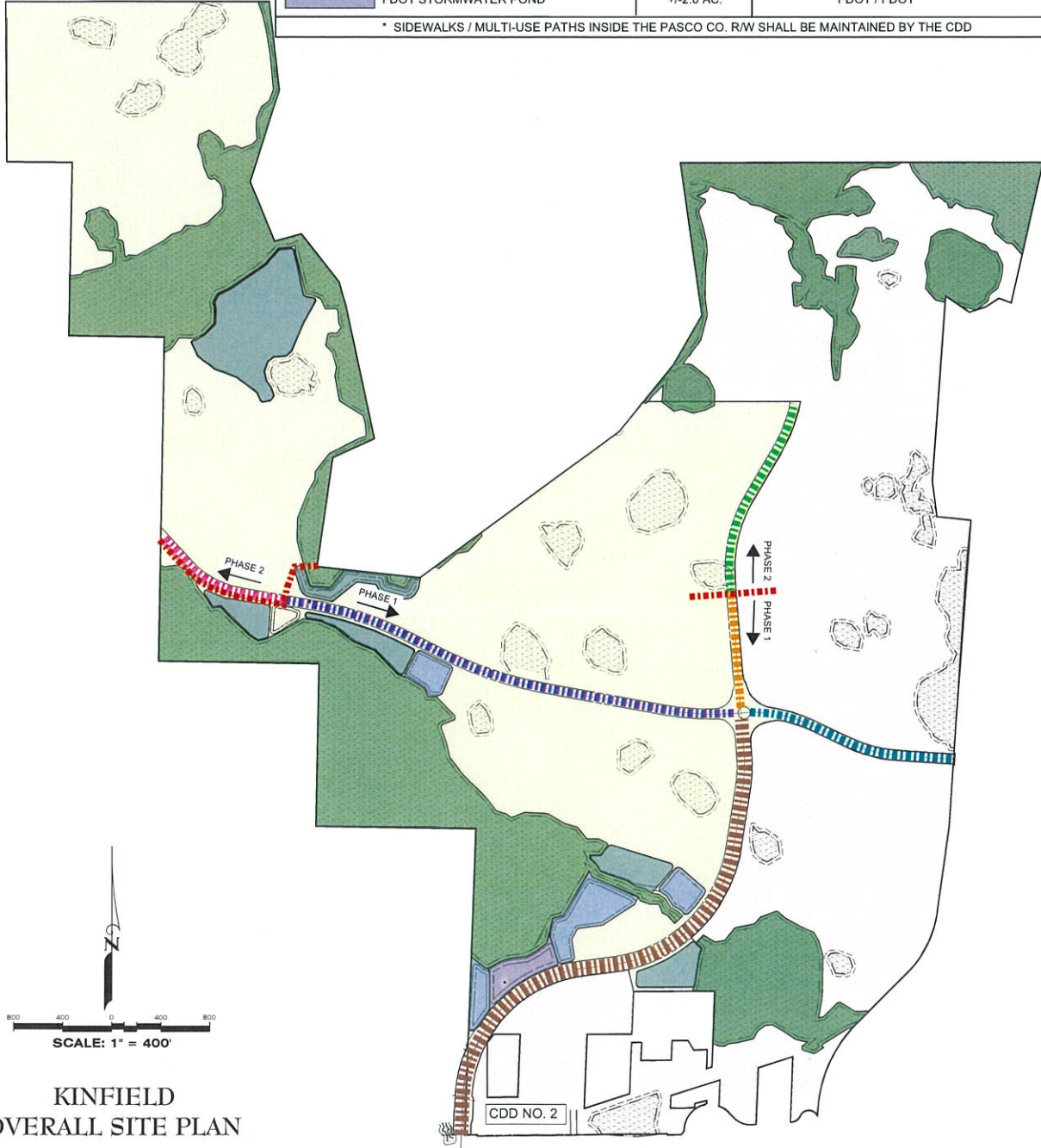


## **KEY INFRASTRUCTURE MAP**

**CDD SUMMARY**

DESCRIPTION	AREA/LENGTH	OWNERSHIP / MAINTENANCE ENTITY
 KD 52 CDD NO. 1	+/-442 AC.	CDD & PASCO COUNTY
 KD 52 CDD NO. 2	+/- 347 AC.	CDD & PASCO COUNTY
 ROAD AE SOUTH (OLD PASCO ROAD)	+/- 4,700 LF	PASCO COUNTY / PASCO COUNTY*
 ROAD AE NORTH PH. 1 (OLD PASCO RD)	+/- 900 LF	PASCO COUNTY / PASCO COUNTY*
 ROAD AD WEST PH. 1 (PASCO ROAD)	+/- 3,900 LF	PASCO COUNTY / PASCO COUNTY*
 ROAD AD EAST PH. 1 (PASCO ROAD)	+/- 1,700 LF	PASCO COUNTY / PASCO COUNTY*
 ROAD AE NORTH PHASE 2 (PASCO ROAD)	+/-1,600 LF	PASCO COUNTY / PASCO COUNTY*
 ROAD AD WEST PHASE 2 (PASCO ROAD)	+/-1,100 LF	PASCO COUNTY / PASCO COUNTY*
 WETLAND CONSERVATION AREA	+/- 185.0 AC.	CDD / CDD
 STORMWATER MANAGEMENT PONDS	+/-9.7 AC.	CDD / CDD
 FLOODPLAIN MITIGATION PONDS	+/- 28.1 AC.	CDD / CDD
 FDOT STORMWATER POND	+/-2.6 AC.	FDOT / FDOT

\* SIDEWALKS / MULTI-USE PATHS INSIDE THE PASCO CO. R/W SHALL BE MAINTAINED BY THE CDD



**KINFIELD  
OVERALL SITE PLAN**

PREPARED BY:  
**Clearview**  
LAND DESIGN, P.L.

Registered Business Number: RY28828  
3010 W Azule St., Suite 150, Tampa, Florida 33609  
Office: 813-243-3919 Fax: 813-243-3975

**EXHIBIT B**

*Final First Supplemental Special Assessment Methodology Report, dated September 17, 2025*

# KD52 COMMUNITY DEVELOPMENT DISTRICT No. 1 & No. 2

Final First Supplemental Special Assessment  
Methodology Report

September 17, 2025



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](http://www.whhassociates.com)

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## **1.0 Introduction**

### **1.1 Purpose**

This Final First Supplemental Special Assessment Methodology Report (the "Final First Supplemental Report") was developed to supplement the Master Special Assessment Methodology Report (the "Master Report") dated March 4, 2025 and to provide a supplemental financing plan and a supplemental special assessment methodology for the KD52 Community Development District No. 1 ("District No. 1") and KD52 Community Development District No. 2 ("District No. 2" and together with District No. 1, the "Districts"), located in Pasco County, Florida, as related to funding the costs of public infrastructure improvements contemplated to be provided by the Districts.

### **1.2 Scope of the Final First Supplemental Report**

This Final First Supplemental Report presents the projections for financing a portion of the District's Capital Improvement Plan (the "CIP") described in the Master Engineer's Report developed by Clearview Land Design, P.L. (the "District Engineer") and dated January 2025 as supplemented by that certain First Supplemental Engineer's Report for the CIP dated August 2025 (collectively, 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 partial funding of the CIP.

### **1.3 Special Benefits and General Benefits**

The public infrastructure improvements undertaken and funded by the Districts as part of the CIP create special and peculiar benefits, different in kind and degree from the general and incidental 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 Districts. The Districts' CIP enables properties within its boundaries to be developed.

There is no doubt that the general public and property owners of property outside the Districts will benefit from the provision of the CIP. However, these benefits are only incidental since the CIP is designed solely to provide special benefits peculiar to property within the Districts. Properties outside of the Districts are not directly served by the CIP and do not depend upon the CIP to obtain or to maintain

their development entitlements. This fact alone clearly distinguishes the special benefits which Districts properties receive compared to those lying outside of the Districts' boundaries.

The CIP will provide public infrastructure improvements which are all necessary in order to make the lands within the Districts developable and saleable. The installation of such improvements will cause the value of the developable and saleable lands within the Districts to increase by more than the sum of the financed cost of the individual components of the CIP. Even though the exact value of the benefits provided by the CIP is hard to estimate at this point, it is nevertheless greater than the costs associated with providing the same.

#### **1.4 Organization of the Final First Supplemental Report**

*Section Two* describes the property uses as proposed by the Landowner, as defined below.

*Section Three* provides a summary of the CIP as determined by the District Engineer.

*Section Four* discusses the financing program for the Districts.

*Section Five* introduces the special assessment methodology for the Districts.

### **2.0 Land Use Program**

#### **2.1 Overview**

The Districts will serve the KD52 property (the "Development"), a master planned, mixed-use development located in Pasco County, Florida. The District No. 1 currently consists of approximately 441.984 +/- acres and District No. 2 currently consists of approximately 346.784 +/- acres for a total of 788.768 +/- acres and both Districts are generally located on the northwest corner of State Road 52 and Interstate 75.

#### **2.2 The Land Use Program**

The development of KD52 is anticipated to be conducted by the owner of the lands within the District or an affiliated entity (the "Landowner"). Based upon the information provided by the Landowner and the Districts' Engineer, the current development plan for District No. 1 envisions a total of 1,469 residential dwelling units

and 20,000 SF of commercial/retail, while the current development plan for District No. 2 envisions a total of 24 residential dwelling units, 235,000 SF of commercial/retail, and 1,900,000 SF of light industrial for a total of 1,493 residential dwelling units, 1,900,000 SF of light industrial, and 255,000 SF of commercial/retail although land use types and unit numbers may change throughout the development period. Table 1 in the *Appendix* illustrates the development plan for the Districts.

### **3.0 The CIP**

#### **3.1 Overview**

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

#### **3.2 The Capital Improvement Plan**

According to the Engineer's Report, the CIP needed to serve the Development is projected to consist of master improvements which will serve and benefit all of the lands in the Districts (the "Master Improvements"). The Districts, however, reserve the right to create further assessment areas to coincide with the phases of development. The CIP of Master Improvements will consist of, but not limited to, collector roadways, water/wastewater master infrastructure, stormwater management, drainage & earthwork (excluding lots), landscape, hardscape & irrigation of master roadways, offsite roadway SR 52 improvements, offsite roadway road AD extension, offsite utilities for Old Pasco Road and SR 52 extensions, offsite utilities for road AD extension, permitting, professional services, and contingencies as set forth in more detail in the Master Engineer's Report. The cost of the Master Improvements is estimated to total approximately \$52,739,400. The public infrastructure improvements that comprise the Master Improvements will serve and provide benefit to all land uses in both Districts and will comprise an interrelated system of improvements, which means all of improvements will serve both Districts and improvements will be interrelated such that they will reinforce one another.

The Residential Improvements will consist of, but not limited to, residential roads, water/wastewater of residential roads, landscape, hardscape & irrigation of residential roadways, multi-family spine road, permitting, professional services, and contingencies as set forth in more detail in the Engineer's Report. The cost of the Residential Improvements is estimated to total approximately \$42,075,000. The public infrastructure improvements that comprise the Residential Improvements will serve and provide benefit to all land uses in District No. 1 and will comprise an interrelated system of improvements, which means all of improvements will serve District No. 1 and improvements will be interrelated such that they will reinforce one another.

The total cost of the public infrastructure improvements is estimated to total approximately \$94,814,400. Table 2 in the *Appendix* illustrates the specific components of the CIP.

The Districts intend to fund a portion of the Master Improvements in the CIP. The public infrastructure improvements that comprise the Master Improvements will serve and provide benefit to all land uses in both Districts and will comprise an interrelated system of improvements, which means all of improvements will serve both Districts and improvements will be interrelated such that they will reinforce one another.

## **4.0 Financing Program**

### **4.1 Overview**

As noted above, the Districts are embarking on a program of capital improvements which will facilitate the development of lands within the Districts. Generally, construction of public improvements is either funded by the Landowner and then acquired by the Districts or funded directly by the Districts. The Districts maintain complete flexibility to construct or acquire the public infrastructure.

The Districts intend to issue Capital Improvement Revenue Bonds, Series 2025 in the principal amount of \$40,475,000 (the "Series 2025 Bonds") to fund \$33,765,000 in Capital Improvement Plan costs, which according to the District Engineer represent the costs of the Phase 1 Master Improvements. The balance of the costs of the Master Improvements in the amount of \$18,974,400 and Residential Improvements in the projected amount of \$42,075,000 are anticipated to be financed with proceeds of future bonds, and/or contributed to the District by the Landowner at no cost.

## **4.2 Types of Bonds Proposed**

The Series 2025 Bonds as projected under this supplemental financing plan would be structured to be amortized in 30 annual installments following an approximately 13-month capitalized interest period. Interest payments on the Series 2025 Bonds would be made every May 1 and November 1, and principal payments on the Series 2025 Bonds would be made every May 1.

In order to finance a portion of the costs of the CIP, the Districts would need to borrow more funds and incur indebtedness in the total amount of \$40,475,000. The difference is comprised of funding a debt service reserve account, capitalized interest, and paying costs of issuance, including the underwriter's discount. Sources and uses of funding for the Series 2025 Bonds are presented in Table 3 in the *Appendix*.

## **5.0 Assessment Methodology**

### **5.1 Overview**

The issuance of the Series 2025 Bonds provides the Districts with a portion of the funds necessary to construct/acquire the infrastructure improvements which are part of the CIP outlined in Section 3.2 and described in more detail by the Districts' Engineer in the Engineer's Report. These improvements lead to special and general benefits, with special benefits accruing to the assessable properties within the boundaries of the Districts and general benefits accruing to areas outside the Districts but being only incidental in nature. The debt incurred in financing the public infrastructure will be secured by assessing properties within the Districts that derive special and peculiar benefits from the CIP. All properties within the Districts that receive special benefits from the CIP will be assessed for their fair share of the debt issued in order to finance all or a portion of the CIP.

### **5.2 Benefit Allocation**

The most current development plan for District No. 1 envisions a total of 1,469 residential dwelling units and 20,000 SF of commercial/retail, while the current development plan for District No. 2 envisions a total of 24 residential dwelling units, 235,000 SF of commercial/retail, and 1,900,000 SF of light industrial for a total of 1,493 residential dwelling units, 1,900,000 SF of light industrial, and 255,000 SF of commercial/retail although land use types and unit numbers may change throughout the development period.

The public infrastructure improvements that comprise the Master Improvements will serve and provide benefit to all land uses in both Districts and will comprise an interrelated system of improvements, which means all of the improvements will serve both Districts and improvements will be interrelated such that they will reinforce one another.

By allowing for the land in both Districts to be developable, both the public infrastructure improvements that comprise the Master Improvements and their combined benefit will be greater than the sum of their individual benefits. All of the land uses within both Districts will benefit from each infrastructure improvement category of the Master Improvements, as the Master Improvements provide basic infrastructure to all land within both Districts and benefit all land within both District as an integrated system of improvements.

As stated previously, the public infrastructure improvements included in the CIP have a logical connection to the special and peculiar benefits received by the land within the Districts, as without such improvements, the development of the properties within the Districts would not be possible. Based upon the connection between the improvements and the special and peculiar benefits to the land within the Districts, the Districts will assign or allocate a portion of the Districts' debt through the imposition of non-ad valorem special 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 special assessment amount levied on that parcel.

The benefit associated with the CIP of the Districts is proposed to be allocated to the different land uses within the Districts in proportion to the density of development and intensity of use of the 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 land uses contemplated to be developed within the Districts based on the relative density of development and the intensity of use of master infrastructure, the total ERU counts for each land use, and the share of the benefit received by each land use.

The rationale behind different ERU weights is supported by the fact that generally and on average units with smaller lot sizes will use and benefit from the Districts' improvements less than units with larger lot sizes, as for instance, generally and on average units with smaller lot

sizes produce less storm water runoff, may produce fewer vehicular trips, and may need less water/sewer capacity than units with larger lot sizes. Additionally, the value of the units with larger lot sizes is likely to appreciate by more in terms of dollars than that of the units with smaller lot sizes as a result of the implementation of the Capital Improvement Plan. 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 by the different land uses from the Districts' improvements. As the development plan associated with the Districts' land is preliminary and subject to change, there is a possibility that certain product types may be created which are not currently contemplated within Table 4 herein. To the extent new product types are designed for development within the Districts' boundaries, by nature of this methodology an ERU factor will be assigned to such product type on the basis of front footage ("FF") using the formula FF/50.

Based on the ERU benefit allocation illustrated in Table 4, Table 5 in the *Appendix* presents the allocation of the amount of Capital Improvement Plan costs to the various product types proposed to be developed within the District based on the ERU benefit allocation factors present in Table 4. Further, Table 5 illustrates the approximate costs that are projected to be financed with the Series 2025 Bonds, and the approximate costs of the portion of the Capital Improvement Plan to be contributed by the Landowner, as the case may be. With the Series 2025 Bonds funding approximately \$33,765,000 in costs of the Capital Improvement Plan, the Landowner is anticipated to fund improvements valued at a cost of \$18,974,400 which will not be funded with proceeds of the Series 2025 Bonds.

**Amenities** - No Bond Assessments securing the Series 2025 Bonds (the "Series 2025 Assessments") will be allocated herein to any platted amenities or other platted common areas planned for the Development. If owned by a homeowner's association, the amenities and common areas would be considered a common element for the exclusive benefit of certain property owners, and would not be subject to Series 2025 Assessments. If the amenities are owned by the Districts, then they would be governmental property not subject to the Series 2025 Assessments and would be open to the general public, subject to the Districts' rules and policies. As such, no Series 2025 Assessments will be assigned to the amenities and common areas.

**Government Property** - Real property owned by units of local, state, and federal governments, or similarly exempt entities, shall not be subject to the Series 2025 Assessments without specific consent thereto. If at any time, any portion of the property contained in the Districts is proposed to be sold or otherwise transferred to a unit of local, state, or federal government, or similarly exempt entity (without consent of such governmental unit to the imposition of Series 2025 Assessments thereon), all future unpaid Series 2025 Assessments for such tax parcel shall become due and payable immediately prior to such transfer.

### 5.3 Assigning Debt

As the land in the Districts is not yet platted for its intended final use and the precise location of the various product types by lot or parcel is unknown, the Series 2025 Assessments will initially be levied on all of the land in the Districts on an equal pro-rata gross acre basis. Consequently, the Bond Assessments for District No. 1 will be levied on approximately 441.984 +/- gross acres on an equal pro-rata gross acre basis and thus the total bonded debt in the amount of \$17,594,973.83 will be preliminarily levied on approximately 441.984 +/- gross acres at a rate of \$39,809.07 per acre. The Series 2025 Assessments for District No. 2 will be levied on approximately 346.784 +/- gross acres on an equal pro-rata gross acre basis and thus the total bonded debt in the amount of \$22,880,026.17 will be preliminarily levied on approximately 346.784 +/- gross acres at a rate of \$65,977.74 per acre.

As the land is platted, the Series 2025 Assessments 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 6 in the Appendix. Such allocation of Series 2025 Assessments to platted parcels will reduce the amounts of Series 2025 Assessments levied on unplatted gross acres within the Districts.

**Transferred Property.** In the event unplatted land is sold to a third party (the "Transferred Property"), the Series 2025 Assessments will be assigned to such Transferred Property at the time of the sale based on the maximum total number of ERUs assigned by the Landowner to that Transferred Property, subject to review by the Districts' methodology consultant, to ensure that any such assignment is reasonable, supported by current development rights and plans, and otherwise consistent with this Final First Supplemental Report. The owner of the Transferred Property will be responsible for the total Series 2025 Assessments applicable to the Transferred Property, regardless of the total number of ERUs

ultimately actually platted. This total Series 2025 Assessment is allocated to the Transferred Property at the time of the 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 Districts as contemplated herein create special and peculiar benefits to certain properties within the Districts. The Districts' improvements benefit assessable properties within the Districts and accrue to all such assessable properties on an ERU basis.

Improvements undertaken by the Districts can be shown to be creating special and peculiar benefits to the property within the Districts. The special and peculiar benefits resulting from each improvement include, but are not limited to:

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

The public infrastructure improvements which are part of the CIP make the land in the Districts developable and saleable and when implemented jointly as parts of the CIP, 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 Series 2025 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 Districts according to reasonable estimates of the special and peculiar benefits derived from the CIP by different land uses.

Accordingly, no acre or parcel of property within the Districts will be liened for the payment of the Series 2025 Assessments more than the determined special benefit peculiar to that property.

## **5.6 True-Up Mechanism**

The Districts' assessment program is predicated on the development of lots in a manner sufficient to include all of the planned ERUs as set forth in Table 4 in the *Appendix* ("Development Plan"). At such time as lands are to be platted (or re-platted) or site plans are to be approved (or re-approved), the plat or site plan (either, herein, "Proposed Plat") shall be presented to the District for a "true-up" review as follows:

- a. If a Proposed Plat results in the same amount of ERUs (and thus Series 2025 Assessments) able to be imposed on the "Remaining Unplatted Lands" (i.e., those remaining unplatted lands after the Proposed Plat is recorded) as compared to what was originally contemplated under the Development Plan, then the Districts shall allocate the Series 2025 Assessments to the product types being platted and the remaining property in accordance with this Report, and cause the Series 2025 Assessments to be recorded in the Districts' improvement lien book.
- b. If a Proposed Plat within the Districts has more than the anticipated ERUs (and Series 2025 Assessments) such that the Remaining Unplatted Developable Lands would be assigned fewer ERUs (and Series 2025 Assessments) than originally contemplated in the Development Plan, then the District may undertake a pro rata reduction of Series 2025 Assessments for all assessed properties within the Districts, may allocate additional ERUs/densities for a future bond finance, or may otherwise address such net decrease as permitted by law.
- c. If a Proposed Plat within the Districts has fewer than the anticipated ERUs (and Series 2025 Assessments) such that the Remaining Unplatted Developable Lands would have to be assigned more ERUs (and Series 2025 Assessments) in order to fully assign all of the ERUs originally contemplated in the Development Plan, then the Districts shall require the landowner(s) of the lands encompassed by the Proposed Plat to pay a "True-Up Payment" equal to the difference between: (i) the Series 2025 Assessments originally contemplated to be imposed on the lands subject to the Proposed Plat, and (ii) the Series 2025 Assessments able to be imposed on the lands subject to the

Proposed Plat, after the Proposed Plat (plus applicable interest, collection costs, penalties, etc.).

With respect to the foregoing true-up analysis, the Districts' Assessment Consultant, in consultation with the Districts' Engineer and District Counsel, shall determine in their sole discretion what amount of ERUs (and thus Series 2025 Assessments) are able to be imposed on the Remaining Unplatted Lands, taking into account a Proposed Plat, by reviewing: a) the original, overall development plan showing the number and type of units reasonably planned for the development, b) the revised, overall Development Plan showing the number and type of units reasonably planned for the development, c) proof of the amount of entitlements for the Remaining Unplatted Lands, d) evidence of allowable zoning conditions that would enable those entitlements to be placed in accordance with the revised Development Plan, and e) documentation that shows the feasibility of implementing the proposed Development Plan. Prior to any decision by the Districts not to impose a true-up payment, a supplemental methodology shall be produced demonstrating that there will be sufficient Series 2025 Assessments to pay debt service on the applicable series of bonds and the District will conduct new proceedings under Chapters 170, 190 and 197, Florida Statutes upon the advice of District Counsel.

Any True-Up Payment shall become due and payable that tax year by the landowner of the lands subject to the Proposed Plat, shall be in addition to the regular Series 2025 Assessments installment payable for such lands, and shall constitute part of the Series 2025 Assessments liens imposed against the Proposed Plat property until paid. A True-Up Payment shall include accrued interest on the applicable bond series to the interest payment date that occurs at least 45 days after the True-Up Payment (or the second succeeding interest payment date if such True-Up Payment is made within forty-five (45) calendar days before an interest payment date (or such other time as set forth in the supplemental indentures for the applicable bond series)).

All Series 2025 Assessments levied run with the land, and such assessment liens include any True-Up Payments. The Districts will not release any liens on property for which True-Up Payments are due, until provision for such payment has been satisfactorily made. Further, upon the Districts' review of the final plat for the developable acres, any unallocated Series 2025 Assessments shall become due and payable and must be paid prior to the District's approval of that plat. This true-up process applies for both plats and/or re-plats.

Such review shall be limited solely to the function and the enforcement of the Districts' assessment liens and/or true-up obligations. Nothing herein shall in any way operate to or be construed as providing any other plat approval or disapproval powers to the Districts. For further detail on the true-up process, please refer to the applicable assessment resolution(s).

## **5.7 Assessment Roll**

The Series 2025 Assessments in the amount of \$40,475,000 are proposed to be levied over the area described in Exhibit "A". Excluding any capitalized interest period, Series 2025 Assessments shall be paid in no more than thirty (30) annual principal installments.

## **6.0 Additional Stipulations**

### **6.1 Overview**

Wrathell, Hunt and Associates, LLC was retained by the Districts to prepare a methodology to fairly allocate the special assessments related to the Districts' CIP. Certain financing, development and engineering data was provided by members of District Staff and/or the Landowner. 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 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

# KD52

## Community Development Districts No. 1 & No. 2

### Land Uses for KD52 CDD No. 1

Land Use	Unit of Measurement	Number of Dwelling Units/Square Feet
<b>Residential</b>		
TH	Residential Unit	230
MF	Residential Unit	680
SFD 35'	Residential Unit	226
SFD 50'	Residential Unit	333
<b>Total Residential</b>		<b>1,469</b>
<b>Non-Residential</b>		
Commercial/Retail	Square Feet	20,000
<b>Total Non-Residential</b>		<b>20,000</b>

### Land Uses for KD52 CDD No. 2

Land Use	Unit of Measurement	Number of Dwelling Units/Square Feet
<b>Residential</b>		
TH	Residential Unit	24
<b>Total Residential</b>		<b>24</b>
<b>Non-Residential</b>		
Commercial/Retail	Square Feet	235,000
Light Industrial	Square Feet	1,900,000
<b>Total Non-Residential</b>		<b>2,135,000</b>

Table 2

# KD52

## Community Development Districts No. 1 & No. 2

### Capital Improvement Plan - Total Master Costs - Supplemental Engineer's Report

Improvement	Phase 1 Master	Phase 2 Master	Total Master
	Improvements	Improvements	Improvements
	Costs	Costs	Costs
Collector Roadways	\$6,300,000.00	\$2,030,000.00	\$8,330,000.00
Water / Wastewater – Master Infrastructure	\$2,760,000.00	\$770,000.00	\$3,530,000.00
Stormwater Management, Drainage & Earthwork (excluding lots)	\$7,200,000.00	\$2,010,000.00	\$9,210,000.00
Landscape, Hardscape & Irrigation – Master Roadways	\$1,211,553.00	\$3,698,447.00	\$4,910,000.00
Offsite Roadway – SR 52 Improvements	\$4,700,000.00	\$2,800,000.00	\$7,500,000.00
Offsite Roadway – Road AD Extension	\$0.00	\$2,390,000.00	\$2,390,000.00
Offsite Utilities – Old Pasco Road / SR 52 Extensions	\$6,840,000.00	\$0.00	\$6,840,000.00
Offsite Utilities – Road AD Extension	\$0.00	\$264,000.00	\$264,000.00
Undergrounding Utilities - Spine Roads	\$2,900,000.00	\$810,000.00	\$3,710,000.00
Permitting	\$120,000.00	\$30,000.00	\$150,000.00
Professional Services	\$750,000.00	\$2,165,400.00	\$2,915,400.00
Contingency	\$983,447.00	\$2,006,553.00	\$2,990,000.00
<b>Total</b>	<b>\$33,765,000.00</b>	<b>\$18,974,400.00</b>	<b>\$52,739,400.00</b>

### Capital Improvement Plan - Total Residential Costs - Supplemental Engineer's Report

Improvement	Phase 1	Phase 2	Total Residential
	Residential	Residential	Improvements
	Improvements	Improvements	Costs
	Costs	Costs	Costs
Residential Roads	\$11,000,000.00	\$5,500,000.00	\$16,500,000.00
Water / Wastewater – Residential Roads	\$7,330,000.00	\$3,670,000.00	\$11,000,000.00
Landscape, Hardscape & Irrigation – Residential Roadways	\$3,330,000.00	\$1,670,000.00	\$5,000,000.00
Multi-Family Spine Road	\$1,000,000.00	\$0.00	\$1,000,000.00
Permitting	\$100,000.00	\$100,000.00	\$200,000.00
Professional Services	\$2,266,000.00	\$1,084,000.00	\$3,350,000.00
Contingency	\$3,399,000.00	\$1,626,000.00	\$5,025,000.00
<b>Total</b>	<b>\$28,425,000.00</b>	<b>\$13,650,000.00</b>	<b>\$42,075,000.00</b>

Table 3

# KD52

## Community Development Districts No. 1 & No. 2

Sources and Uses of Funds

Series 2025

**Sources**

Bond Proceeds:	
Par Amount	\$40,475,000.00
Original Issue Discount	-\$33,181.60
<b>Total Sources</b>	<b>\$40,441,818.40</b>

**Uses**

Project Fund Deposits:	
Project Fund	\$33,765,000.00
Other Fund Deposits:	
Debt Service Reserve Fund	\$2,909,075.01
Capitalized Interest Fund	\$2,602,455.64
	<u>\$5,511,530.65</u>
Delivery Date Expenses:	
Costs of Issuance	\$355,787.75
Underwriter's Discount	\$809,500.00
	<u>\$1,165,287.75</u>
<b>Total Uses</b>	<b>\$40,441,818.40</b>

Table 4

# KD52

## Community Development Districts No. 1 & No. 2

Benefit Allocation for KD52 CDD No. 1 & No. 2

Land Use	Number of Dwelling Units/Square Feet	ERU per Unit/1,000 Square Feet	Total ERU
<b>Residential</b>			
TH	254	0.60	152.40
MF	680	0.40	272.00
SFD 35'	226	0.75	169.50
SFD 50'	333	1.00	333.00
<b>Total Residential</b>	<u>1,493</u>		<u>926.90</u>
<b>Non-Residential</b>			
Commercial/Retail	255,000	0.75	191.25
Light Industrial	1,900,000	0.20	380.00
<b>Total Non-Residential</b>	<u>2,155,000</u>		<u>571.25</u>
<b>Total All Land Uses</b>			<b>1,498.15</b>

Table 5

# KD52

## Community Development Districts No. 1 & No. 2

### Capital Improvement Plan Cost Allocation

Land Use	Capital Improvement Plan Costs Allocation Based on ERU Method	Capital Improvement Plan Costs Funded with Future Bonds and/or Contributed by the Developer	Capital Improvement Plan Costs Funded with Series 2025 Bonds
<b>Residential</b>			
TH	\$5,364,939.80	\$2,801,545.15	\$2,563,394.65
MF	\$9,575,220.64	\$4,780,613.06	\$4,794,607.58
SFD 35'	\$5,966,911.39	\$3,593,630.18	\$2,373,281.21
SFD 50'	\$11,722,604.68	\$6,999,499.58	\$4,723,105.10
<b>Total Residential</b>	<u>\$32,629,676.51</u>	<u>\$18,175,287.96</u>	<u>\$14,454,388.55</u>
<b>Non-Residential</b>			
Commercial/Retail	\$6,732,577.01	\$792,640.78	\$5,939,936.23
Light Industrial	\$13,377,146.48	\$6,471.26	\$13,370,675.22
<b>Total Non-Residential</b>	<u>\$20,109,723.49</u>	<u>\$799,112.04</u>	<u>\$19,310,611.45</u>
	<b>\$52,739,400.00</b>	<b>\$18,974,400.00</b>	<b>\$33,765,000.00</b>

Table 6

# KD52

## Community Development Districts No. 1 & No. 2

### Bond Assessments Apportionment for KD52 CDD No. 1 - Master Costs

Land Use	Number of Dwelling Units/Square Feet	Total Bond Assessments Apportionment	Bond Assessments Apportionment per Dwelling Unit/1,000 Square Feet	Annual Debt Service per Dwelling Unit/1,000 Square Feet*
<b>Residential</b>				
TH	230	\$2,782,464.91	\$12,097.67	\$925.00
MF	680	\$5,747,423.12	\$8,452.09	\$646.26
SFD 35'	226	\$2,844,915.06	\$12,588.12	\$962.50
SFD 50'	333	\$5,661,711.21	\$17,002.14	\$1,300.00
<b>Total Residential</b>	1469	\$17,036,514.31		
<b>Non-Residential</b>				
Commercial/Retail	20,000	\$558,459.52	\$27,922.98	\$2,135.02
<b>Total Non-Residential</b>	20,000	\$558,459.52		
<b>Total All Land Uses</b>		<b>\$17,594,973.83</b>		

### Bond Assessments Apportionment for KD52 CDD No. 2 - Master Costs

Land Use	Number of Dwelling Units/Square Feet	Total Bond Assessments Apportionment	Bond Assessments Apportionment per Dwelling Unit/1,000 Square Feet	Annual Debt Service per Dwelling Unit/1,000 Square Feet*
<b>Residential</b>				
TH	24	\$290,344.16	\$12,097.67	\$925.00
<b>Total Residential</b>	24	\$290,344.16		
<b>Non-Residential</b>				
Commercial/Retail	235,000	\$6,561,899.40	\$27,922.98	\$2,135.02
Light Industrial	1,900,000	\$16,027,782.60	\$8,435.68	\$645.00
<b>Total Non-Residential</b>	2,135,000	\$22,589,682.00		
<b>Total All Land Uses</b>		<b>\$22,880,026.17</b>		

### Combined Bond Assessments Apportionment

Land Use	Number of Dwelling Units/Square Feet	Total Bond Assessments Apportionment	Bond Assessments Apportionment per Dwelling Unit/1,000 Square Feet	Annual Debt Service per Dwelling Unit/1,000 Square Feet*
<b>Residential</b>				
TH	254	\$3,072,809.08	\$12,097.67	\$925.00
MF	680	\$5,747,423.12	\$8,452.09	\$646.26
SFD 35'	226	\$2,844,915.06	\$12,588.12	\$962.50
SFD 50'	333	\$5,661,711.21	\$17,002.14	\$1,300.00
<b>Total Residential</b>	1493	\$17,326,858.47		
<b>Non-Residential</b>				
Commercial/Retail	255,000	\$7,120,358.92	\$27,922.98	\$2,135.02
Light Industrial	1,900,000	\$16,027,782.60	\$8,435.68	\$645.00
<b>Total Non-Residential</b>	2,155,000	\$23,148,141.53		
<b>Total All Land Uses</b>		<b>\$40,475,000.00</b>		

\* Includes costs of collection estimated at 2% (subject to change) and an allowance for early payment discount estimated at 4% (subject to change)

## **Exhibit “A”**

Series 2025 Assessments in the amount of \$17,594,973.83 are proposed to be levied over the area as described below:

**THIS IS NOT A FIELD SURVEY**

THERE MAY BE ADDITIONAL RESTRICTIONS AFFECTING THIS PROPERTY THAT MAY BE FOUND IN THE PUBLIC RECORDS OF THIS COUNTY.

THIS LEGAL DESCRIPTION AND SKETCH WAS PREPARED WITHOUT THE BENEFIT OF A TITLE POLICY.

BEARINGS ARE BASED UPON, SEE SKETCH AND LEGAL DESCRIPTION

**LEGAL DESCRIPTION:**

A parcel of land lying in Sections 5, 6 and 8, Township 25 South, Range 20 East, Pasco County, Florida, being more particularly described as follows:

Begin at the Southeast corner of Section 6, Township 25 South, Range 20 East, Pasco County, Florida; thence N89°08'49"W, along the South line of the Southeast 1/4, of the Southeast 1/4 of said Section 6, for 1,312.49 feet, to the Southwest corner of said Southeast 1/4 of the Southeast 1/4 of Section 6; thence N00°58'55"E, along the West line of said Southeast 1/4, of the Southeast 1/4 of Section 6, for 1,327.22 feet, to the Southeast corner of the Northwest 1/4 of said Southeast 1/4 of Section 6; thence N89°11'43"W, along the South line of said Northwest 1/4 of the Southeast 1/4 of Section 6, for 1,313.41 feet, to the Southwest corner of said Northwest 1/4 of the Southeast 1/4 of Section 6; thence N00°56'33"E, along the West line of said Northwest 1/4 of the Southeast 1/4 of Section 6, for 1,326.12 feet, to the Southwest corner of the Southwest 1/4 of the Northeast 1/4 of said Section 6; thence N00°57'49"E, along the West line of said Southwest 1/4 of the Northeast 1/4 of Section 6, for 1,322.60 feet, to the Southeast corner of the Northeast 1/4 of the Northwest 1/4 of said Section 6; thence N89°11'44"W, along the South line of said Northeast 1/4 of the Northwest 1/4 of Section 6, for 779.00 feet; thence leaving said South line of the Northeast 1/4 of the Northwest 1/4 of Section 6, N01°06'51"E, for 1,417.14 feet, to the point of intersection with the North line of said Northeast 1/4 of the Northwest 1/4 of Section 6; thence S89°34'08"E, along said North line of the Northeast 1/4 of the Northwest 1/4 of Section 6, for 775.38 feet, to the Northwest corner of said Northeast 1/4 of Section 6; thence N89°56'47"E, along the North line of said Northeast 1/4 of Section 6, for 729.63 feet; thence leaving said North line of the Northeast 1/4 of Section 6, S17°34'53"W, for 160.67 feet; thence S22°21'26"E, for 524.19 feet; thence N75°16'46"E, for 226.35 feet; thence S38°20'27"E, for 497.57 feet; thence S16°03'01"E, for 211.58 feet; thence S12°06'21"E, for 1,102.92 feet; thence S65°24'42"W, for 373.63 feet; thence S08°21'24"W, for 898.97 feet; thence S83°52'13"E, for 852.32 feet; thence N53°43'08"E, for 2,018.47 feet; thence N39°21'50"E, for 314.81 feet; thence N90°00'00"E, for 1,289.33 feet, to the point of intersection with a non-tangent curve, concave Westerly; thence Southerly along the arc of said curve, with a radial bearing of N79°38'29"W, having a radius of 1,240.00 feet, a central angle of 20°08'29", an arc length of 435.90 feet, and a chord bearing S20°25'45"W, for 433.66 feet, to the point of tangent; thence S30°30'00"W, for 460.36 feet, to the point of curvature of a curve concave Easterly; thence Southerly along the arc of said curve, having a radius of 1,106.00 feet, a central angle of 35°00'00", an arc length of 675.62 feet, and a chord bearing S13°00'00"W, for 665.16 feet, to the point of tangent; thence S04°30'00"E, for 749.00 feet, to the point of curvature of a curve concave Easterly; thence Southerly along the arc of said curve, having a radius of 471.00 feet, a central angle of 11°05'20", an arc length of 91.16 feet, and a chord bearing S10°02'40"E, for 91.01 feet, to the point of intersection with a non-tangent line; thence S80°32'04"E, for 6.63 feet, to the point of intersection with a non-tangent curve, concave Northeasterly; thence Southeasterly along the arc of said curve, with a radial bearing of N74°03'54"E, having a radius of 465.00 feet, a central angle of 14°52'32", an arc length of 120.73 feet, and a chord bearing S23°22'22"E, for 120.39 feet, to the point of compound curvature of a curve concave

[CONTINUED ON SHEET 2]

NOTE. THE GEOMETRY PERTAINING TO THE PARCEL OF LAND DESCRIBED HEREIN IS BASED UPON THAT CERTAIN ALTA/NSPS LAND TITLE SURVEY TITLED "HINES ACQUISITIONS LLC, PASCO COUNTY, FLORIDA", PREPARED BY DENNIS J. BENHAM, PROJECT NUMBER, KRUSEN-DOUGLAS, DATED 2-2-2022, WITH A LATEST REVISION DATE OF 9-26-2022 AND RECORD DOCUMENTS AS REFERENCED HEREON AND IS SUBJECT TO AN ACCURATE FIELD BOUNDARY SURVEY.

PREPARED FOR: **HINES**

SHEET DESCRIPTION: **CDD PARCEL**

SCALE: <b>NONE</b>	DATE: <b>2-27-2023</b>	DRAWN: <b>BGD</b>	CALCED: <b>BGD</b>	CHECKED: <b>JTP</b>	SEE SHEETS 1-3 FOR LEGAL DESCRIPTION SEE SHEET 4 FOR KEY MAP AND LEGEND SEE SHEET 5-II FOR SKETCH AND TABLES
JOB No.: <b>2022-58A</b>	EPN: <b>1168</b>	SECTION: <b>5, 6, 8</b>	TOWNSHIP: <b>25S</b>	RANGE: <b>20E</b>	REVISION 1: 8-21-2024 RBG



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NOT VALID WITHOUT ORIGINAL SIGNATURE AND SEAL OF A FLORIDA LICENSED SURVEYOR AND MAPPER

CERTIFIED AS TO LEGAL DESCRIPTION AND SKETCH STATE OF **FLORIDA**

**8-23-2024**

**JARED T. PACENAUDE**  
PROFESSIONAL SURVEYOR AND MAPPER  
LICENSE NUMBER **LS 6971**  
STATE OF FLORIDA

**THIS IS NOT A FIELD SURVEY**

THERE MAY BE ADDITIONAL RESTRICTIONS AFFECTING THIS PROPERTY THAT MAY BE FOUND IN THE PUBLIC RECORDS OF THIS COUNTY.

THIS LEGAL DESCRIPTION AND SKETCH WAS PREPARED WITHOUT THE BENEFIT OF A TITLE POLICY.

BEARINGS ARE BASED UPON, SEE SKETCH AND LEGAL DESCRIPTION

[CONTINUED FROM SHEET 1]

Northeasterly; thence Southeasterly along the arc of said curve, having a radius of 115.00 feet, a central angle of 21°19'38", an arc length of 42.81 feet, and a chord bearing S41°28'28"E, for 42.56 feet, to the point of reverse curvature of a curve concave Southwesterly; thence Southeasterly along the arc of said curve, having a radius of 138.00 feet, a central angle of 10°42'10", an arc length of 25.78 feet, and a chord bearing S46°47'12"E, for 25.74 feet, to the point of reverse curvature of a curve concave Northeasterly; thence Southeasterly along the arc of said curve, having a radius of 65.00 feet, a central angle of 17°57'04", an arc length of 20.37 feet, and a chord bearing S50°24'39"E, for 20.28 feet, to the point of compound curvature of a curve concave Northerly; thence Easterly along the arc of said curve, having a radius of 315.00 feet, a central angle of 22°51'49", an arc length of 125.70 feet, and a chord bearing S70°49'06"E, for 124.87 feet, to the point of intersection with a non-tangent curve, concave Southerly; thence Easterly along the arc of said curve, with a radial bearing of S09°02'45"W, having a radius of 1,245.37 feet, a central angle of 15°19'18", an arc length of 333.03 feet, and a chord bearing S73°17'36"E, for 332.04 feet, to the point of intersection with a non-tangent curve, concave Southwesterly; thence Southeasterly along the arc of said curve, with a radial bearing of S23°36'44"W, having a radius of 1,200.00 feet, a central angle of 01°53'16", an arc length of 39.54 feet, and a chord bearing S65°26'38"E, for 39.53 feet, to the point of tangent; thence S64°30'00"E, for 302.99 feet, to the point of curvature of a curve concave Northerly; thence Easterly along the arc of said curve, having a radius of 1,092.00 feet, a central angle of 21°34'23", an arc length of 411.16 feet, and a chord bearing S75°17'12"E, for 408.74 feet, to the point of tangent; thence S86°04'23"E, for 459.34 feet, to the point of intersection with the West Right-of-Way line of INTERSTATE 75 (STATE ROAD 93), according to Florida Department of Transportation (FDOT) Right-of-Way map Section 14140-XXXX; thence S03°54'41"W, along said West Right-of-Way line of INTERSTATE 75 (STATE ROAD 93), for 80.00 feet; thence leaving said West Right-of-Way line of INTERSTATE 75 (STATE ROAD 93), N86°04'23"W, for 459.36 feet, to the point of curvature of a curve concave Northerly; thence Westerly along the arc of said curve, having a radius of 1,172.00 feet, a central angle of 21°34'23", an arc length of 441.28 feet, and a chord bearing N75°17'12"W, for 438.68 feet, to the point of tangent; thence N64°30'00"W, for 302.99 feet, to the point of curvature of a curve concave Southerly; thence Westerly along the arc of said curve, having a radius of 1,120.00 feet, a central angle of 11°01'37", an arc length of 215.55 feet, and a chord bearing N70°00'49"W, for 215.22 feet, to the point of compound curvature of a curve concave Southerly; thence Westerly along the arc of said curve, having a radius of 306.00 feet, a central angle of 32°28'23", an arc length of 173.43 feet, and a chord bearing S88°14'11"W, for 171.12 feet, to the point of tangent; thence S72°00'00"W, for 30.26 feet, to the point of curvature of a curve concave Southeasterly; thence Southwesterly along the arc of said curve, having a radius of 146.00 feet, a central angle of 76°30'00", an arc length of 194.94 feet, and a chord bearing S33°45'00"W, for 180.78 feet, to the point of tangent; thence S04°30'00"E, for 100.34 feet, to the point of curvature of a curve concave Westerly; thence Southerly along the arc of said curve, having a radius of 1,208.00 feet, a central angle of 13°30'35", an arc length of 284.84 feet, and a chord bearing S02°15'18"W, for 284.18 feet, to the point of intersection with a non-tangent line; thence S09°00'00"W, for 488.00 feet, to the point of curvature of a curve concave Northwesterly; thence Southwesterly along the arc of said curve, having a radius of 1,208.00 feet, a

[CONTINUED ON SHEET 3]

NOTE: THE GEOMETRY PERTAINING TO THE PARCEL OF LAND DESCRIBED HEREIN IS BASED UPON THAT CERTAIN ALTA/NSPS LAND TITLE SURVEY TITLED "HINES ACQUISITIONS LLC, PASCO COUNTY, FLORIDA", PREPARED BY DENNIS J. BENHAM, PROJECT NUMBER, KRUSEN-DOUGLAS, DATED 2-2-2022, WITH A LATEST REVISION DATE OF 9-26-2022 AND RECORD DOCUMENTS AS REFERENCED HEREON AND IS SUBJECT TO AN ACCURATE FIELD BOUNDARY SURVEY.

PREPARED FOR:

**HINES**

SHEET DESCRIPTION:

**CDD PARCEL**

SCALE: <b>NONE</b>	DATE: <b>2-27-2023</b>	DRAWN: <b>BGD</b>	CALCED: <b>BGD</b>	CHECKED: <b>JTP</b>	SEE SHEETS 1-3 FOR LEGAL DESCRIPTION SEE SHEET 4 FOR KEY MAP AND LEGEND SEE SHEET 5-II FOR SKETCH AND TABLES
JOB No.: <b>2022-58A</b>	EPN: <b>1168</b>	SECTION: <b>5, 6, 8</b>	TOWNSHIP: <b>25S</b>	RANGE: <b>20E</b>	REVISION 1: 8-21-2024 JRC



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CERTIFIED AS TO LEGAL DESCRIPTION AND SKETCH  
STATE OF FLORIDA  
JARED TORATENAUE  
PROFESSIONAL SURVEYOR AND MAPPER  
LICENSE NUMBER LS 6971  
STATE OF FLORIDA  
8-23-2024

**THIS IS NOT A FIELD SURVEY**

THERE MAY BE ADDITIONAL RESTRICTIONS AFFECTING THIS PROPERTY THAT MAY BE FOUND IN THE PUBLIC RECORDS OF THIS COUNTY.

THIS LEGAL DESCRIPTION AND SKETCH WAS PREPARED WITHOUT THE BENEFIT OF A TITLE POLICY.

BEARINGS ARE BASED UPON: SEE SKETCH AND LEGAL DESCRIPTION

[CONTINUED FROM SHEET 2]

central angle of 40°34'46", an arc length of 855.56 feet, and a chord bearing S29°17'23"W, for 837.79 feet, to the point of intersection with a non-tangent line; thence S44°10'02"E, for 103.31 feet; thence S41°27'20"E, for 22.04 feet; thence S18°15'20"W, for 60.63 feet; thence S09°19'49"W, for 119.58 feet; thence S08°49'59"W, for 109.27 feet; thence S19°29'37"W, for 56.19 feet; thence S09°43'34"W, for 8.48 feet, to the point of intersection with the North line of the plat of GASQUE'S SUBDIVISION, as recorded in Plat Book 2, Page 19, of the Public Records of Pasco County, Florida, same being the point of intersection with the North line of LOT C, according to said plat of GASQUE'S SUBDIVISION; thence S89°57'31"W, along the North line of said LOT C and the North line of LOT D, according to said plat of GASQUE'S SUBDIVISION, respectively, for 486.54 feet, to the Northwest corner of said LOT D; thence leaving said North line of the plat of GASQUE'S SUBDIVISION, N12°45'17"W, for 181.98 feet, to the point of intersection with a non-tangent curve, concave Northerly; thence Westerly along the arc of said curve, with a radial bearing of N12°46'25"W, having a radius of 1,206.93 feet, a central angle of 05°35'21", an arc length of 117.74 feet, and a chord bearing S80°01'15"W, for 117.69 feet, to the point of intersection with a non-tangent line; thence S82°46'39"W, for 254.87 feet, to the point of curvature of a curve concave Southeasterly; thence Southwesterly along the arc of said curve, having a radius of 1,038.00 feet, a central angle of 80°08'27", an arc length of 1,451.87 feet, and a chord bearing S42°42'26"W, for 1,336.38 feet, to the point of intersection with a non-tangent line; thence S41°58'44"E, for 15.75 feet; thence S02°00'41"W, for 167.17 feet; thence S14°13'04"W, for 50.48 feet; thence S00°16'45"E, for 83.49 feet, to the point of intersection with the North Right-of-Way line of STATE ROAD 52, according to said FDOT Right-of-Way map, Section 14140-XXXX; thence S89°20'40"W, along said North Right-of-Way line of STATE ROAD 52, for 50.83 feet, to the point of intersection with the West line of the Northwest 1/4 of Section 8, Township 25 South, Range 20 East, Pasco County, Florida; thence leaving said North Right-of-Way line of STATE ROAD 52, N02°04'22"E, along said West line of Northwest 1/4 of Section 8 (being the basis of bearings for this legal description), for 2,495.35 feet, to the POINT OF BEGINNING.

Containing 19,252,844 square feet or 441.984 acres, more or less.

NOTE, THE GEOMETRY PERTAINING TO THE PARCEL OF LAND DESCRIBED HEREIN IS BASED UPON THAT CERTAIN ALTA/NSPS LAND TITLE SURVEY TITLED "HINES ACQUISITIONS LLC, PASCO COUNTY, FLORIDA", PREPARED BY DENNIS J. BENHAM, PROJECT NUMBER, KRUSEN-DOUGLAS, DATED 2-2-2022, WITH A LATEST REVISION DATE OF 9-26-2022 AND RECORD DOCUMENTS AS REFERENCED HEREON AND IS SUBJECT TO AN ACCURATE FIELD BOUNDARY SURVEY.

PREPARED FOR:

**HINES**

SHEET DESCRIPTION:

**CDD PARCEL**

SCALE: <b>NONE</b>	DATE: <b>2-27-2023</b>	DRAWN: <b>BGD</b>	CALCED: <b>BGD</b>	CHECKED: <b>JTP</b>	SEE SHEETS 1-3 FOR LEGAL DESCRIPTION SEE SHEET 4 FOR KEY MAP AND LEGEND SEE SHEET 5-II FOR SKETCH AND TABLES
JOB No.: <b>2022-58A</b>	EPN: <b>1168</b>	SECTION: <b>5, 6, 8</b>	TOWNSHIP: <b>25S</b>	RANGE: <b>20E</b>	REVISION 1: 8-21-2024-PBG



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CERTIFIED AS TO LEGAL DESCRIPTION AND SKETCH  
STATE OF FLORIDA  
**8-23-2024**  
**JARED T. PATENAUDE**  
PROFESSIONAL SURVEYOR AND MAPPER  
LICENSE NUMBER LS 6971  
STATE OF FLORIDA

## **Exhibit “A”**

Series 2025 Assessments in the amount of \$22,880,026.17 are proposed to be levied over the area as described below:

**THIS IS NOT A FIELD SURVEY**

THERE MAY BE ADDITIONAL RESTRICTIONS AFFECTING THIS PROPERTY THAT MAY BE FOUND IN THE PUBLIC RECORDS OF THIS COUNTY.

THIS LEGAL DESCRIPTION AND SKETCH WAS PREPARED WITHOUT THE BENEFIT OF A TITLE POLICY.

BEARINGS ARE BASED UPON: SEE SKETCH AND LEGAL DESCRIPTION

**LEGAL DESCRIPTION:**

**NON-RESIDENTIAL PARCEL 1:**

A parcel of land being a portion of Sections 5 and 8, Township 25 South, Range 20 East, Pasco County, Florida, being more particularly described as follows:

COMMENCE at the Northwest corner of Section 8, Township 25 South, Range 20 East, Pasco County, Florida; thence S02°04'22"W, along the West line of the Northwest 1/4 of said Section 8 (being the basis of bearings for this legal description), for 2,495.35 feet, to the point of intersection with the North Right-of-Way line of STATE ROAD 52, according to Florida Department of Transportation (FDOT) Right-of-Way map Section 14140-XXXX; thence leaving said West line of the Northwest 1/4 of Section 8, N89°20'40"E, along said North Right-of-Way line of STATE ROAD 52, for 50.83 feet, to the POINT OF BEGINNING; thence leaving said North Right-of-Way line of STATE ROAD 52, N00°16'45"W, for 83.49 feet; thence N14°13'04"E, for 50.48 feet; thence N02°00'41"E, for 167.17 feet; thence N41°58'44"W, for 15.75 feet, to the point of intersection with a non-tangent curve, concave Southeasterly; thence Northeasterly along the arc of said curve, with a radial bearing of S87°21'48"E, having a radius of 1,038.00 feet, a central angle of 80°08'27", an arc length of 1,451.87 feet, and a chord bearing N42°42'26"E, for 1,336.38 feet, to the point of tangent; thence N82°46'39"E, for 254.87 feet, to the point of intersection with a non-tangent curve, concave Northerly; thence Easterly along the arc of said curve, with a radial bearing of N07°11'04"W, having a radius of 1,206.93 feet, a central angle of 05°35'21", an arc length of 117.74 feet, and a chord bearing N80°01'15"E, for 117.69 feet, to the point of intersection with a non-tangent line; thence S12°45'17"E, for 181.98 feet, to the Northwest corner of LOT D, same being the Northeast corner of LOT E, both according to the plat of GASQUE'S SUBDIVISION, as recorded in Plat Book 2, Page 19, of the Public Records of Pasco County, Florida; thence S02°08'02"W, along the East line of said LOT E, same being the West line of said LOT D, for 349.80 feet, to the Southeast corner of said LOT E, same being the Northeast corner of LOT G, according to said Plat of GASQUE'S SUBDIVISION; thence S89°57'31"W, along the South line of said LOT E, same being the North line of said LOT G, for 365.22 feet; thence leaving said South line of LOT E, same being said North line of LOT G, S02°08'02"W, for 603.72 feet, to the point of intersection with the South line of said LOT G, same being the Northerly line of the former Seaboard System Railroad Right-of-Way; thence N72°10'34"E, along said South line of LOT G, same being said Northerly line of the former Seaboard System Railroad Right-of-Way, for 388.27 feet, to the Southeast corner of said LOT G, same being the Southwest corner of said LOT D; thence N02°08'02"E, along the East line of said LOT G, same being said West line of LOT D, for 418.88 feet; thence leaving said East line of LOT G, same being said West line of LOT D, N89°53'36"E, for 83.61 feet; thence S02°08'02"W, for 146.31 feet; thence N89°57'31"E, for 249.73 feet, to the point of intersection with the East line of said LOT D, same being the West line of LOT C, according to said plat of GASQUE'S SUBDIVISION; thence N02°00'59"E, along said East line of LOT D, same being said West line of LOT C, for 160.49 feet; thence leaving said East line of LOT D, same being said West line of LOT C, N89°57'31"E, for 132.99 feet; thence S30°08'56"E, for 90.20 feet; thence N87°22'23"E, for 109.20 feet; thence S01°02'43"W, for 156.61 feet, to the point of intersection with the South line of said LOT C, same being said Northerly line of the former

[CONTINUED ON SHEET 2]

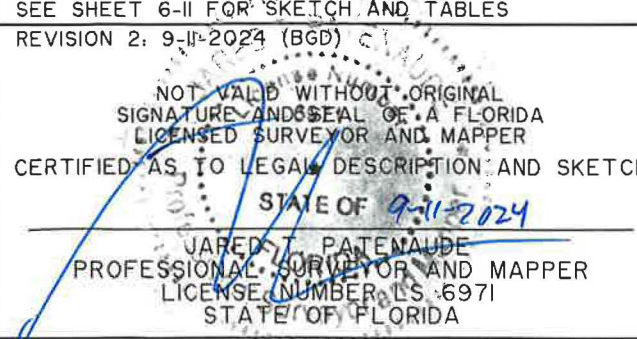
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PREPARED FOR:

**HINES**

SHEET DESCRIPTION:

**NON-RESIDENTIAL PARCEL**

SCALE: <b>NONE</b>	DATE: <b>2-27-2023</b>	DRAWN: BGD	CALCED: BGD	CHECKED: JTP	SEE SHEETS 1-4 FOR LEGAL DESCRIPTION SEE SHEET 5 FOR KEY, MAP, AND LEGEND SEE SHEET 6-II FOR SKETCH AND TABLES
JOB No.: <b>2022-58A</b>	EPN: <b>1168</b>	SECTION: <b>5 and 8</b>	TOWNSHIP: <b>25S</b>	RANGE: <b>20E</b>	REVISION 2: 9-11-2024 (BGD) 



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CERTIFIED AS TO LEGAL DESCRIPTION AND SKETCH  
STATE OF **9-11-2024**  
**JARED T. PATEMAUDE**  
PROFESSIONAL SURVEYOR AND MAPPER  
LICENSE NUMBER: LS 6971  
STATE OF FLORIDA

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BEARINGS ARE BASED UPON: SEE SKETCH AND LEGAL DESCRIPTION

[CONTINUED FROM SHEET 1]

Seaboard System Railroad Right-of-Way; thence N72°10'56"E, along said South line of LOT C, same being said Northerly line of the former Seaboard System Railroad Right-of-Way, for 45.00 feet, to the Southeast corner of said LOT C; thence N02°00'58"E, along the East line of said LOT C, for 617.74 feet, to the Northeast corner of said LOT C; thence S89°57'31"W, along the North line of said LOT C, same being the North line of said plat of GASQUE'S SUBDIVISION, for 180.61 feet; thence leaving said North line of LOT C, same being said North line of the plat of GASQUE'S SUBDIVISION, N09°43'34"E, for 8.48 feet; thence N19°29'37"E, for 56.19 feet; thence N08°49'59"E, for 109.27 feet; thence N09°19'49"E, for 119.58 feet; thence N18°15'20"E, for 60.63 feet; thence N41°27'20"W, for 22.04 feet; thence N44°10'02"W, for 103.31 feet, to the point of intersection with a non-tangent curve, concave Northwesterly; thence Northeasterly along the arc of said curve, with a radial bearing of N40°25'14"W, having a radius of 1,208.00 feet, a central angle of 40°34'46", an arc length of 855.56 feet, and a chord bearing N29°17'23"E, for 837.79 feet, to the point of tangent; thence N09°00'00"E, for 488.00 feet, to the point of intersection with a non-tangent curve, concave Westerly; thence Northerly along the arc of said curve, with a radial bearing of N80°59'25"W, having a radius of 1,208.00 feet, a central angle of 13°30'35", an arc length of 284.84 feet, and a chord bearing N02°15'18"E, for 284.18 feet, to the point of tangent; thence N04°30'00"W, for 100.34 feet, to the point of curvature of a curve concave Southeasterly; thence Northeasterly along the arc of said curve, having a radius of 146.00 feet, a central angle of 76°30'00", an arc length of 194.94 feet, and a chord bearing N33°45'00"E, for 180.78 feet, to the point of tangent; thence N72°00'00"E, for 30.26 feet, to the point of curvature of a curve concave Southerly; thence Easterly along the arc of said curve, having a radius of 306.00 feet, a central angle of 32°28'23", an arc length of 173.43 feet, and a chord bearing N88°14'11"E, for 171.12 feet, to the point of compound curvature of a curve concave Southerly; thence Easterly along the arc of said curve, having a radius of 1,120.00 feet, a central angle of 11°01'37", an arc length of 215.55 feet, and a chord bearing S70°00'49"E, for 215.22 feet, to the point of tangent; thence S64°30'00"E, for 302.99 feet, to the point of curvature of a curve concave Northerly; thence Easterly along the arc of said curve, having a radius of 1,172.00 feet, a central angle of 21°34'23", an arc length of 441.28 feet, and a chord bearing S75°17'12"E, for 438.68 feet, to the point of tangent; thence S86°04'23"E, for 459.36 feet, to the point of intersection with the West Right-of-Way line of INTERSTATE 75 (STATE ROAD 93), according to said FDOT Right-of-Way map Section 14140-XXXX, said point being hereinafter referred to as the Northeasterly most corner of the lands described herein as NON-RESIDENTIAL PARCEL 1; thence the following five (5) courses along said West Right-of-Way line of INTERSTATE 75 (STATE ROAD 93); (1) thence S03°54'41"W, for 515.82 feet; (2) thence S08°07'59"W, for 697.63 feet, to the point of intersection with a non-tangent curve, concave Northwesterly; (3) thence Southwesterly along the arc of said curve, with a radial bearing of N82°09'53"W, having a radius of 860.00 feet, a central angle of 37°09'41", an arc length of 557.79 feet, and a chord bearing S26°24'57"W, for 548.06 feet, to the point of tangent; (4) thence S44°59'47"W, for 578.11 feet, to the point of curvature of a curve concave Southeasterly; (5) thence Southwesterly along the arc of said curve, having a radius of 1,113.00 feet, a central angle of 09°58'17", an arc length of 193.70 feet, and a chord bearing S40°00'39"W, for 193.45 feet, to the point of intersection with a non-tangent line, same being the point of intersection with the

[CONTINUED ON SHEET 3]

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PREPARED FOR:

**HINES**

SHEET DESCRIPTION:

**NON-RESIDENTIAL PARCEL**

SCALE: <b>NONE</b>	DATE: <b>2-27-2023</b>	DRAWN: BGD	CALCED: BGD	CHECKED: JTP	SEE SHEETS 1-4 FOR LEGAL DESCRIPTION SEE SHEET 5 FOR KEY MAP AND LEGEND SEE SHEET 6-II FOR SKETCH AND TABLES
JOB No.: <b>2022-58A</b>	EPN: <b>1168</b>	SECTION: <b>5 and 8</b>	TOWNSHIP: <b>25S</b>	RANGE: <b>20E</b>	REVISION 2: 9-11-2024 (BGD)



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BEARINGS ARE BASED UPON: SEE SKETCH AND LEGAL DESCRIPTION  
[CONTINUED FROM SHEET 2]

Southerly line of said former Seaboard System Railroad Right-of-Way; thence the following four (4) courses along said Southerly line of the former Seaboard System Railroad Right-of-Way, same being the North line of LOTS O, P, Q, R and S, respectively, according to said plat of GASQUE'S SUBDIVISION; (1) thence S72°10'05"W, for 423.17 feet; (2) thence S72°23'24"W, for 297.96 feet; (3) thence S72°22'44"W, for 330.68 feet, to the Northeast corner of said LOT P; (4) thence S72°23'53"W, for 421.74 feet, to the Northwest corner of said LOT O; thence leaving said Southerly line of the former Seaboard System Railroad Right-of-Way, same being said North line of LOTS O, P, Q, R and S, respectively, S01°56'58"W, along the West line of said LOT O, for 201.99 feet; thence leaving said West line of LOT O, S89°57'42"E, for 101.49 feet; thence N01°56'58"E, for 99.83 feet; thence N86°34'16"E, for 98.12 feet, to the point of intersection with the East line of said LOT O; thence S02°10'08"W, along said East line of said LOT O, for 15.19 feet, to the point of intersection with said North Right-of-Way line of STATE ROAD 52, same being the point of intersection with a non-tangent curve, concave Southeasterly; thence the following seven (7) courses along said North Right-of-Way line of STATE ROAD 52; (1) thence Southwesterly along the arc of said curve, with a radial bearing of S36°32'45"E, having a radius of 215.25 feet, a central angle of 54°13'02", an arc length of 203.68 feet, and a chord bearing S26°20'44"W, for 196.17 feet, to the point of intersection with a non-tangent line; (2) thence S36°59'09"W, for 39.29 feet; (3) thence S89°20'40"W, for 113.06 feet; (4) thence N00°39'20"W, for 10.00 feet; (5) thence S89°20'40"W, for 1,550.01 feet; (6) thence N00°39'20"W, for 10.00 feet; (7) thence S89°20'40"W, for 52.69 feet, to the POINT OF BEGINNING.

TOGETHER WITH:

**NON-RESIDENTIAL PARCEL 2:**

A parcel of land lying in Section 5, Township 25 South, Range 20 East, Pasco County, Florida, being more particularly described as follows:

Commence at the aforementioned Northeasterly most corner of NON-RESIDENTIAL PARCEL 1, said point lying on the West Right-of-Way line of INTERSTATE 75 (STATE ROAD 93), according to Florida Department of Transportation (FDOT) Right-of-Way map Section 14140-XXXX; thence N03°54'41"E, along said West Right-of-Way line of INTERSTATE 75 (STATE ROAD 93), for 80.00 feet, to the POINT OF BEGINNING; thence leaving said West Right-of-Way line of INTERSTATE 75 (STATE ROAD 93), N86°04'23"W, for 459.34 feet, to the point of curvature of a curve concave Northerly; thence Westerly along the arc of said curve, having a radius of 1,092.00 feet, a central angle of 21°34'23", an arc length of 411.16 feet, and a chord bearing N75°17'12"W, for 408.74 feet, to the point of tangent; thence N64°30'00"W, for 302.99 feet, to the point of curvature of a curve concave Southwesterly; thence Northwesterly along the arc of said curve, having a radius of 1,200.00 feet, a central angle of 01°53'16", an arc length of 39.54 feet, and a chord bearing N65°26'38"W, for 39.53 feet, to the point of intersection with a non-tangent curve, concave Southerly; thence Westerly along the arc of said curve, with a radial bearing of S24°22'03"W, having a radius of 1,245.37 feet, a central angle of 15°19'18", an arc length of 333.03 feet, and a chord bearing N73°17'36"W, for 332.04 feet, to the point of intersection with a non-tangent curve, concave

[CONTINUED ON SHEET 4]

NOTE: THE GEOMETRY PERTAINING TO THE PARCEL OF LAND DESCRIBED HEREIN IS BASED UPON THAT CERTAIN ALTA/NSPS LAND TITLE SURVEY TITLED "HINES ACQUISITIONS LLC, PASCO COUNTY, FLORIDA", PREPARED BY DENNIS J. BENHAM, PROJECT NUMBER: KRUSEN-DOUGLAS, DATED 2-2-2022, WITH A LATEST REVISION DATE OF 9-26-2022 AND RECORD DOCUMENTS AS REFERENCED HEREON AND IS SUBJECT TO AN ACCURATE FIELD BOUNDARY SURVEY.

PREPARED FOR:

**HINES**

SHEET DESCRIPTION:

**NON-RESIDENTIAL PARCEL**

SCALE: <b>NONE</b>	DATE: <b>2-27-2023</b>	DRAWN: BGD	CALCED: BGD	CHECKED: JTP	SEE SHEETS 1-4 FOR LEGAL DESCRIPTION SEE SHEET 5 FOR KEY MAP AND LEGEND SEE SHEET 6-II FOR SKETCH AND TABLES
JOB No.: <b>2022-58A</b>	EPN: <b>1168</b>	SECTION: <b>5 and 8</b>	TOWNSHIP: <b>25S</b>	RANGE: <b>20E</b>	REVISION 2: 9-11-2024 (BGD)



**FLORIDA DESIGN CONSULTANTS, INC.**

— THINK IT. ACHIEVE IT. —

17907 APRILE DRIVE, SUITE 150, LAND O' LAKES, FLORIDA 34638  
PHONE: (800) 532 - 1047 FAX: (727) 848 - 3648 WWW.FLDESIGN.COM L.B. NO.6707

NOT VALID WITHOUT ORIGINAL SIGNATURE AND SEAL OF A FLORIDA LICENSED SURVEYOR AND MAPPER  
CERTIFIED AS TO LEGAL DESCRIPTION AND SKETCH

**9-11-2024**  
JARED T. PATENAUDE  
PROFESSIONAL SURVEYOR AND MAPPER  
LICENSE NUMBER LS 6971  
STATE OF FLORIDA

**THIS IS NOT A FIELD SURVEY**

THERE MAY BE ADDITIONAL RESTRICTIONS AFFECTING THIS PROPERTY THAT MAY BE FOUND IN THE PUBLIC RECORDS OF THIS COUNTY.

THIS LEGAL DESCRIPTION AND SKETCH WAS PREPARED WITHOUT THE BENEFIT OF A TITLE POLICY.

BEARINGS ARE BASED UPON: SEE SKETCH AND LEGAL DESCRIPTION

[CONTINUED FROM SHEET 3]

Northerly; thence Westerly along the arc of said curve, with a radial bearing of N07°45'00"E, having a radius of 315.00 feet, a central angle of 22°51'49", an arc length of 125.70 feet, and a chord bearing N70°49'06"W, for 124.87 feet, to the point of compound curvature of a curve concave Northeasterly; thence Northwesterly along the arc of said curve, having a radius of 65.00 feet, a central angle of 17°57'04", an arc length of 20.37 feet, and a chord bearing N50°24'39"W, for 20.28 feet, to the point of reverse curvature of a curve concave Southwesterly; thence Northwesterly along the arc of said curve, having a radius of 138.00 feet, a central angle of 10°42'10", an arc length of 25.78 feet, and a chord bearing N46°47'12"W, for 25.74 feet, to the point of reverse curvature of a curve concave Northeasterly; thence Northwesterly along the arc of said curve, having a radius of 115.00 feet, a central angle of 21°19'38", an arc length of 42.81 feet, and a chord bearing N41°28'28"W, for 42.56 feet, to the point of compound curvature of a curve concave Northeasterly; thence Northwesterly along the arc of said curve, having a radius of 465.00 feet, a central angle of 14°52'32", an arc length of 120.73 feet, and a chord bearing N23°22'22"W, for 120.39 feet, to the point of intersection with a non-tangent line; thence N80°32'04"W, for 6.63 feet, to the point of intersection with a non-tangent curve, concave Easterly; thence Northerly along the arc of said curve, with a radial bearing of N74°24'40"E, having a radius of 471.00 feet, a central angle of 11°05'20", an arc length of 91.16 feet, and a chord bearing N10°02'40"W, for 91.01 feet, to the point of tangent; thence N04°30'00"W, for 749.00 feet, to the point of curvature of a curve concave Easterly; thence Northerly along the arc of said curve, having a radius of 1,106.00 feet, a central angle of 35°00'00", an arc length of 675.62 feet, and a chord bearing N13°00'00"E, for 665.16 feet, to the point of tangent; thence N30°30'00"E, for 460.36 feet, to the point of curvature of a curve concave Westerly; thence Northerly along the arc of said curve, having a radius of 1,240.00 feet, a central angle of 20°08'29", an arc length of 435.90 feet, and a chord bearing N20°25'45"E, for 433.66 feet, to the point of intersection with a non-tangent line; thence N90°00'00"W, for 1,289.33 feet; thence N39°21'50"E, for 392.31 feet; thence N29°56'57"E, for 464.93 feet; thence N07°58'07"W, for 1,259.65 feet, to the point of intersection with the North line of the Northwest 1/4 of Section 5, Township 25 South, Range 20 East; thence N89°57'03"E, along said North line of the Northwest 1/4 of Section 5 and the North line of the Northeast 1/4 of said Section 5, respectively, for 2,978.81 feet, to said West Right-of-Way line of INTERSTATE 75 (STATE ROAD 93); thence the following ten (10) courses along said West Right-of-Way line of INTERSTATE 75 (STATE ROAD 93) and the West line of Right-of-Way PARCEL 112, PART "B", as described in Official Records Book 8969, Page 3027, of the Public Records of Pasco County, Florida, respectively; (1) thence S12°55'12"W, for 1,178.71 feet; (2) thence N68°35'11"W, for 106.60 feet; (3) thence S56°58'31"W, for 137.01 feet; (4) thence S72°30'41"W, for 135.14 feet; (5) thence N56°10'07"W, for 237.80 feet; (6) thence S04°11'01"W, for 1,519.06 feet; (7) thence S07°05'08"E, for 290.84 feet; (8) thence S84°13'32"E, for 283.41 feet, to the point of intersection with a non-tangent curve, concave Easterly; (9) thence Southerly along the arc of said curve, with a radial bearing of S83°28'00"E, having a radius of 11,609.16 feet, a central angle of 02°37'26", an arc length of 531.67 feet, and a chord bearing S05°13'17"W, for 531.62 feet, to the point of intersection with a non-tangent line; (10) thence S03°54'41"W, for 1,385.16 feet, to the POINT OF BEGINNING.

All together containing 15,105,912 square feet or 346.784 acres, more or less.

NOTE: THE GEOMETRY PERTAINING TO THE PARCEL OF LAND DESCRIBED HEREIN IS BASED UPON THAT CERTAIN ALTA/NSPS LAND TITLE SURVEY TITLED "HINES ACQUISITIONS LLC, PASCO COUNTY, FLORIDA", PREPARED BY DENNIS J. BENHAM, PROJECT NUMBER: KRUSEN-DOUGLAS, DATED 2-2-2022, WITH A LATEST REVISION DATE OF 9-26-2022 AND RECORD DOCUMENTS AS REFERENCED HEREON AND IS SUBJECT TO AN ACCURATE FIELD BOUNDARY SURVEY.

PREPARED FOR: **HINES**

SHEET DESCRIPTION: **NON-RESIDENTIAL PARCEL**

SCALE: <b>NONE</b>	DATE: <b>2-27-2023</b>	DRAWN: <b>BGD</b>	CALCED: <b>BGD</b>	CHECKED: <b>JTP</b>	SEE SHEETS 1-4 FOR LEGAL DESCRIPTION SEE SHEET 5 FOR KEY MAP AND LEGEND SEE SHEET 6-II FOR SKETCH AND TABLES
JOB No.: <b>2022-58A</b>	EPN: <b>1168</b>	SECTION: <b>5 and 8</b>	TOWNSHIP: <b>25S</b>	RANGE: <b>20E</b>	REVISION 2: 9-11-2024 (BGD)



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CERTIFIED AS TO LEGAL DESCRIPTION AND SKETCH

**JARED T. PATENAUDE**  
PROFESSIONAL SURVEYOR AND MAPPER  
LICENSE NUMBER LS 6971  
STATE OF FLORIDA

9-11-2024

**EXHIBIT C**  
**Maturities and Coupon of Series 2025 Bonds**

Bond Component	Maturity Date	CUSIP	Amount	Rate	Yield	Price	Premium (-Discount)
Term Bond due 2030:							
	05/01/2027		555,000	4.250%	4.250%	100.000	
	05/01/2028		575,000	4.250%	4.250%	100.000	
	05/01/2029		600,000	4.250%	4.250%	100.000	
	05/01/2030	48668R AAO	630,000	4.250%	4.250%	100.000	
			2,360,000				
Term Bond due 2035:							
	05/01/2031		655,000	5.000%	5.000%	100.000	
	05/01/2032		690,000	5.000%	5.000%	100.000	
	05/01/2033		725,000	5.000%	5.000%	100.000	
	05/01/2034		765,000	5.000%	5.000%	100.000	
	05/01/2035	48668R ABB	805,000	5.000%	5.000%	100.000	
			3,640,000				
Term Bond due 2045:							
	05/01/2036		850,000	5.875%	5.900%	99.704	-2,516.00
	05/01/2037		900,000	5.875%	5.900%	99.704	-2,664.00
	05/01/2038		955,000	5.875%	5.900%	99.704	-2,826.80
	05/01/2039		1,010,000	5.875%	5.900%	99.704	-2,989.60
	05/01/2040		1,075,000	5.875%	5.900%	99.704	-3,182.00
	05/01/2041		1,140,000	5.875%	5.900%	99.704	-3,374.40
	05/01/2042		1,205,000	5.875%	5.900%	99.704	-3,566.80
	05/01/2043		1,280,000	5.875%	5.900%	99.704	-3,788.80
	05/01/2044		1,355,000	5.875%	5.900%	99.704	-4,010.80
	05/01/2045	48668R AD4	1,440,000	5.875%	5.900%	99.704	-4,262.40
			11,210,000				-33,181.60
Term Bond due 2056:							
	05/01/2046		1,530,000	6.125%	6.125%	100.000	
	05/01/2047		1,625,000	6.125%	6.125%	100.000	
	05/01/2048		1,730,000	6.125%	6.125%	100.000	
	05/01/2049		1,835,000	6.125%	6.125%	100.000	
	05/01/2050		1,955,000	6.125%	6.125%	100.000	
	05/01/2051		2,075,000	6.125%	6.125%	100.000	
	05/01/2052		2,205,000	6.125%	6.125%	100.000	
	05/01/2053		2,345,000	6.125%	6.125%	100.000	
	05/01/2054		2,495,000	6.125%	6.125%	100.000	
	05/01/2055		2,650,000	6.125%	6.125%	100.000	
	05/01/2056	48668R AE2	2,820,000	6.125%	6.125%	100.000	
			23,265,000				
			40,475,000				-33,181.60

**EXHIBIT D**  
**Sources and Uses of Funds for Series 2025 Bonds**

KD52 Community Development District No. 1  
(Pasco County, Florida)  
Special Assessment Revenue Bonds, Series 2025  
Pricing Date: September 16, 2025  
Final Pricing Numbers

Dated Date                    09/25/2025  
Delivery Date                09/25/2025

Sources:

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Bond Proceeds:	
Par Amount	40,475,000.00
Original Issue Discount	-33,181.60
	40,441,818.40

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Uses:

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Project Fund Deposits:	
Project Fund	33,765,000.00
Other Fund Deposits:	
Debt Service Reserve Fund   100% of MADs	2,909,075.01
Capitalized Interest Fund   Thru 11/1/2026	2,602,455.64
	5,511,530.65
Delivery Date Expenses:	
Cost of Issuance	355,787.75
Underwriter's Discount	809,500.00
	1,165,287.75
	40,441,818.40

**EXHIBIT E**  
**Annual Debt Service Payment Due on Series 2025 Bonds**

Period Ending	Principal	Coupon	Interest	Debt Service	Annual Debt Service
11/01/2025			236,586.88	236,586.88	236,586.88
05/01/2026			1,182,934.38	1,182,934.38	
11/01/2026			1,182,934.38	1,182,934.38	2,365,868.76
05/01/2027	555,000	4.250%	1,182,934.38	1,737,934.38	
11/01/2027			1,171,140.63	1,171,140.63	2,909,075.01
05/01/2028	575,000	4.250%	1,171,140.63	1,746,140.63	
11/01/2028			1,158,921.88	1,158,921.88	2,905,062.51
05/01/2029	600,000	4.250%	1,158,921.88	1,758,921.88	
11/01/2029			1,146,171.88	1,146,171.88	2,905,093.76
05/01/2030	630,000	4.250%	1,146,171.88	1,776,171.88	
11/01/2030			1,132,784.38	1,132,784.38	2,908,956.26
05/01/2031	655,000	5.000%	1,132,784.38	1,787,784.38	
11/01/2031			1,116,409.38	1,116,409.38	2,904,193.76
05/01/2032	690,000	5.000%	1,116,409.38	1,806,409.38	
11/01/2032			1,099,159.38	1,099,159.38	2,905,568.76
05/01/2033	725,000	5.000%	1,099,159.38	1,824,159.38	
11/01/2033			1,081,034.38	1,081,034.38	2,905,193.76
05/01/2034	765,000	5.000%	1,081,034.38	1,846,034.38	
11/01/2034			1,061,909.38	1,061,909.38	2,907,943.76
05/01/2035	805,000	5.000%	1,061,909.38	1,866,909.38	
11/01/2035			1,041,784.38	1,041,784.38	2,908,693.76
05/01/2036	850,000	5.875%	1,041,784.38	1,891,784.38	
11/01/2036			1,016,815.63	1,016,815.63	2,908,600.01
05/01/2037	900,000	5.875%	1,016,815.63	1,916,815.63	
11/01/2037			990,378.13	990,378.13	2,907,193.76
05/01/2038	955,000	5.875%	990,378.13	1,945,378.13	
11/01/2038			962,325.00	962,325.00	2,907,703.13
05/01/2039	1,010,000	5.875%	962,325.00	1,972,325.00	
11/01/2039			932,656.25	932,656.25	2,904,981.25
05/01/2040	1,075,000	5.875%	932,656.25	2,007,656.25	
11/01/2040			901,078.13	901,078.13	2,908,734.38
05/01/2041	1,140,000	5.875%	901,078.13	2,041,078.13	
11/01/2041			867,590.63	867,590.63	2,908,668.76
05/01/2042	1,205,000	5.875%	867,590.63	2,072,590.63	
11/01/2042			832,193.75	832,193.75	2,904,784.38
05/01/2043	1,280,000	5.875%	832,193.75	2,112,193.75	
11/01/2043			794,593.75	794,593.75	2,906,787.50
05/01/2044	1,355,000	5.875%	794,593.75	2,149,593.75	
11/01/2044			754,790.63	754,790.63	2,904,384.38
05/01/2045	1,440,000	5.875%	754,790.63	2,194,790.63	
11/01/2045			712,490.63	712,490.63	2,907,281.26
05/01/2046	1,530,000	6.125%	712,490.63	2,242,490.63	
11/01/2046			665,634.38	665,634.38	2,908,125.01
05/01/2047	1,625,000	6.125%	665,634.38	2,290,634.38	
11/01/2047			615,868.75	615,868.75	2,906,503.13
05/01/2048	1,730,000	6.125%	615,868.75	2,345,868.75	
11/01/2048			562,887.50	562,887.50	2,908,756.25
05/01/2049	1,835,000	6.125%	562,887.50	2,397,887.50	
11/01/2049			506,690.63	506,690.63	2,904,578.13
05/01/2050	1,955,000	6.125%	506,690.63	2,461,690.63	

Period Ending	Principal	Coupon	Interest	Debt Service	Annual Debt Service
11/01/2050			446,818.75	446,818.75	2,908,509.38
05/01/2051	2,075,000	6.125%	446,818.75	2,521,818.75	
11/01/2051			383,271.88	383,271.88	2,905,090.63
05/01/2052	2,205,000	6.125%	383,271.88	2,588,271.88	
11/01/2052			315,743.75	315,743.75	2,904,015.63
05/01/2053	2,345,000	6.125%	315,743.75	2,660,743.75	
11/01/2053			243,928.13	243,928.13	2,904,671.88
05/01/2054	2,495,000	6.125%	243,928.13	2,738,928.13	
11/01/2054			167,518.75	167,518.75	2,906,446.88
05/01/2055	2,650,000	6.125%	167,518.75	2,817,518.75	
11/01/2055			86,362.50	86,362.50	2,903,881.25
05/01/2056	2,820,000	6.125%	86,362.50	2,906,362.50	
11/01/2056					2,906,362.50
	40,475,000		49,323,296.46	89,798,296.46	89,798,296.46

**KD52**

**COMMUNITY DEVELOPMENT DISTRICT**

**No. 2**

**7**

**KD52**

**COMMUNITY DEVELOPMENT DISTRICT**

**No. 2**

**7A**

35605

# Tampa Bay Times

Published Daily

STATE OF FLORIDA } ss

COUNTY OF PASCO County

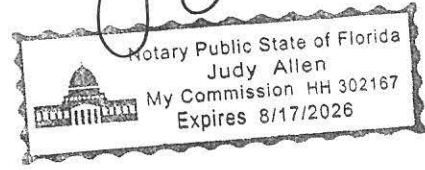
Before the undersigned authority personally appeared Deirdre Bonett who on oath says that he/she is a Legal Advertising Representative of the Tampa Bay Times a daily newspaper printed in St. Petersburg, in Pasco County, Florida that the attached copy of advertisement being a Legal Notice in the matter RFP for Annual Audit was published in said newspaper by print in the issues of 04/27/25 or by publication on the newspaper's website, if authorized.

Affiant further says that the website or newspaper complies with all legal requirements for publication in chapter 50, Florida Statutes. Affiant further says the said Tampa Bay Times is a newspaper published in Pasco County, Florida and that the said newspaper has heretofore been continuously published in said Pasco County, Florida each day and has been entered as a second class mail matter at the post office in said Pasco County, Florida for a period of one year next preceding the first publication of the attached copy of advertisement, and affiant further says that he/she 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.

Signature of Affiant 

Sworn to and subscribed before me this 04/27/2025

Signature of Notary of Public  
Personally known  or produced identification.  
Type of identification produced \_\_\_\_\_



**KD52 COMMUNITY DEVELOPMENT DISTRICT NO. 2  
REQUEST FOR PROPOSALS FOR ANNUAL AUDIT SERVICES**

The KD52 Community Development District No. 2 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, 2025, 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 Pasco County, Florida, and has an annual operating budget of approximately \$69,474. The final contract will require that, among other things, the audit for the fiscal year ending September 30, 2025, be completed no later than June 30, 2026.

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 and one (1) unbound copy of their proposal to the District Manager, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431, (561) 571-0010 in an envelope marked on the outside "Auditing Services, KD52 Community Development District No. 2." Proposals must be received by 12:00 p.m. on May 5, 2025, at the office of the District Manager. Please direct all questions regarding this Notice to the District Manager.

District Manager  
April 27, 2025 35605

**KD52**

**COMMUNITY DEVELOPMENT DISTRICT**

**No. 2**

**7B**

**KD52 COMMUNITY DEVELOPMENT DISTRICT NO. 2  
REQUEST FOR PROPOSALS FOR ANNUAL AUDIT SERVICES**

The KD52 Community Development District No. 2 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, 2025, 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 Pasco County, Florida, and has an annual operating budget of approximately \$69,474. The final contract will require that, among other things, the audit for the fiscal year ending September 30, 2025, be completed no later than June 30, 2026.

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District Manager

## **KD52 Community Development District No. 2**

### **Request for Proposals**

#### **District Auditing Services for Fiscal Year 2025**

Pasco County, Florida

#### **INSTRUCTIONS TO PROPOSERS**

**SECTION 1. DUE DATE.** Sealed proposals must be received no later than **May 5, 2025, at 12:00 p.m.**, at the offices of District Manager, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431, (561) 571-0010. 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 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 - KD52 Community Development District No. 2" on the face of it. **Pricing must include 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 (the "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 for the District's first audit for which there are no special assessment bonds, plus the lump sum cost of two (2) annual renewals, which renewals shall include services related to the District's anticipated issuance of special assessment bonds.

**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.

**KD52 COMMUNITY DEVELOPMENT DISTRICT NO. 2  
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.

**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.

**KD52**

**COMMUNITY DEVELOPMENT DISTRICT**

**No. 2**

**7C**

**KD52**

**COMMUNITY DEVELOPMENT DISTRICT**

**No. 2**

**7CI**

**KD52 COMMUNITY DEVELOPMENT  
DISTRICT NO. 2**

**PROPOSAL FOR AUDIT SERVICES**

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**PROPOSED BY:**

Berger, Toombs, Elam, Gaines & Frank  
CERTIFIED PUBLIC ACCOUNTANTS, PL

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600 Citrus Avenue, Suite 200  
Fort Pierce, Florida 34950

(772) 461-6120

**CONTACT PERSON:**

Maritza Stonebraker, CPA, Director

**DATE OF PROPOSAL:**

May 5, 2025

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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

May 5, 2025

KD52 Community Development District No. 2  
Wrathell Hunt & Associates LLC  
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 KD52 Community Development District No. 2.

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 KD52 Community Development District No. 2. 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.

KD52 Community Development District No. 2  
May 5, 2025

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. Maritza Stonebraker is the person authorized to make representations for the firm.

Thank you again for the opportunity to submit this proposal to KD52 Community Development District No. 2.

Very truly yours,



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 69 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 69 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 34 of the 38 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 12 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:

	<u>Total</u>
Partners/Directors (CPA's)	7
Managers (1 CPA)	1
Senior/Supervisor Accountants (1 CPA)	4
Staff Accountants	8
Paraprofessional	6
Administrative	<u>6</u>
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 KD52 Community Development District No. 2, 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 74 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 1,100 community development districts, and over 2,100 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 AUDIT 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 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

Florida Green Finance Authority  
Jeff Walker, Special District Services  
(561) 630-4922

Gateway Community Development  
District  
Stephen Bloom, Severn Trent Management  
(954) 753-5841

South Village Community Development District  
Darrin Mossing, Governmental Management  
Services LLC  
(407) 841-5524

Habitat 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

Beacon Lakes Community  
Development District

Alta Lakes Community Development  
District

Beaumont Community Development  
District

Amelia Concourse Community  
Development District

Bella Collina Community Development  
District

Amelia Walk Community  
Development District

Bonnet Creek Community  
Development District

Aqua One Community Development  
District

Buckeye Park Community  
Development District

Arborwood Community Development  
District

Candler Hills East Community  
Development District

Arlington Ridge Community  
Development District

Cedar Hammock Community  
Development District

Bartram Springs Community  
Development District

Central Lake Community  
Development District

Baytree Community Development  
District

Channing Park Community  
Development District

## GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Cheval West Community Development District	Evergreen Community Development District
Coconut Cay Community Development District	Forest Brooke Community Development District
Colonial Country Club Community Development District	Gateway Services Community Development District
Connerton West Community Development District	Gramercy Farms Community Development District
Copperstone Community Development District	Greenway Improvement District
Creekside @ Twin Creeks Community Development District	Greyhawk Landing Community Development District
Deer Run Community Development District	Griffin Lakes Community Development District
Dowden West Community Development District	Habitat Community Development District
DP1 Community Development District	Harbor Bay Community Development District
Eagle Point Community Development District	Harbourage at Braden River Community Development District
East Nassau Stewardship District	Harmony Community Development District
Eastlake Oaks Community Development District	Harmony West Community Development District
Easton Park Community Development District	Harrison Ranch Community Development District
Estancia @ Wiregrass Community Development District	Hawkstone Community Development District

## GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Heritage Harbor Community Development District	Madeira Community Development District
Heritage Isles Community Development District	Marhsall Creek Community Development District
Heritage Lake Park Community Development District	Meadow Pointe IV Community Development District
Heritage Landing Community Development District	Meadow View at Twin Creek Community Development District
Heritage Palms Community Development District	Mediterra North Community Development District
Heron Isles Community Development District	Midtown Miami Community Development District
Heron Isles Community Development District	Mira Lago West Community Development District
Highland Meadows II Community Development District	Montecito Community Development District
Julington Creek Community Development District	Narcoossee Community Development District
Laguna Lakes Community Development District	Naturewalk Community Development District
Lake Bernadette Community Development District	New Port Tampa Bay Community Development District
Lakeside Plantation Community Development District	Overoaks Community Development District
Landings at Miami Community Development District	Panther Trace II Community Development District
Legends Bay Community Development District	Paseo Community Development District
Lexington Oaks Community Development District	Pine Ridge Plantation Community Development District
Live Oak No. 2 Community Development District	Piney Z Community Development District

## GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Poinciana Community Development District	Sampson Creek Community Development District
Poinciana West Community Development District	San Simeon Community Development District
Port of the Islands Community Development District	Six Mile Creek Community Development District
Portofino Isles Community Development District	South Village Community Development District
Quarry Community Development District	Southern Hills Plantation I Community Development District
Renaissance Commons Community Development District	Southern Hills Plantation III Community Development District
Reserve Community Development District	South Fork Community Development District
Reserve #2 Community Development District	St. John's Forest Community Development District
River Glen Community Development District	Stoneybrook South Community Development District
River Hall Community Development District	Stoneybrook South at ChampionsGate Community Development District
River Place on the St. Lucie Community Development District	Stoneybrook West Community Development District
Rivers Edge Community Development District	Tern Bay Community Development District
Riverwood Community Development District	Terracina Community Development District
Riverwood Estates Community Development District	Tison's Landing Community Development District
Rolling Hills Community Development District	TPOST Community Development District
Rolling Oaks Community Development District	

**GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)**

Triple Creek Community  
Development District

Vizcaya in Kendall  
Development District

TSR Community Development  
District

Waterset North Community  
Development District

Turnbull Creek Community  
Development District

Westside Community Development  
District

Twin Creeks North Community  
Development District

WildBlue Community Development  
District

Urban Orlando Community  
Development District

Willow Creek Community  
Development District

Verano #2 Community  
Development District

Willow Hammock Community  
Development District

Viera East Community  
Development District

Winston Trails Community  
Development District

VillaMar Community  
Development District

Zephyr Ridge Community  
Development District

## GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

### Other Governmental Organizations

City of Westlake	Office of the Medical Examiner, District 19
Florida Inland Navigation District	Rupert J. Smith Law Library of St. Lucie County
Fort Pierce Farms Water Control District	St. Lucie Education Foundation
Indian River Regional Crime Laboratory, District 19, Florida	Seminole Improvement District
Viera Stewardship District	Troup Indiantown Water Control District

### Current or Recent Single Audits.

St. Lucie County, Florida  
Early Learning Coalition, Inc.  
Gateway Services Community Development District  
Healthy Start Coalition

Members of our audit team have acquired extensive experience from performing or participating in over 1,800 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  
Indian River School District – Internal Accounts

### 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 \$3,350 for the years ended September 30, 2025 and 2026, and \$3,500 for the year ended September 30, 2027. In addition, if a bond issuance occurs during the fiscal year, there will be an additional fee of \$1,400 per issuance. The fee is contingent upon the financial records and accounting systems of KD52 Community Development District No. 2 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 KD52 Community Development District No. 2 as of September 30, 2025, 2026 and 2027. 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**

#### **David S. McGuire, CPA, CITP**

Director – 31 years experience

#### **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
  - 19<sup>th</sup> 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.

## ***Commitment to Quality Service***

### **Personnel Qualifications and Experience**

**David S. McGuire, CPA, CITP (Continued)**

Director

#### **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**

#### **Matthew Gonano, CPA**

Director – 14 years total experience

#### **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**

#### **Melissa Marlin, CPA**

Director – 11 years

#### **Education**

- ◆ Indian River State College, A.A. – Accounting
- ◆ Florida Atlantic University, B.B.A. – Accounting

#### **Registrations**

- ◆ Certified Public Accountant – State of Florida, State Board of Accountancy

#### **Professional Affiliations/Community Service**

- ◆ Member of the American Institute of Certified Public Accountants
- ◆ Member of the Florida Institute of Certified Public Accountants
- ◆ Affiliate member of the Government Finance Officers Association

#### **Professional Experience**

- ◆ Accountant with over 10 years of experience providing professional services to nonprofit and governmental entities.
- ◆ Performed over 300 audits of nonprofit and governmental organizations in accordance with Governmental Accounting Auditing Standards (GAAS)
- ◆ Performed Single Audits of nonprofit organizations in accordance with 2 CFR Part 200 Subpart F, Uniform Guidance, Audits of State, Local Governments, and Non-Profit Organizations.

#### **Continuing Professional Education**

- ◆ Mrs. Marlin participates in numerous continuing professional education courses provided by nationally recognized sponsors 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**

#### **Maritza Stonebraker, CPA**

Director – 9 years

#### **Education**

- ◆ Indian River State College, B.S. – Accounting

#### **Registrations**

- ◆ Certified Public Accountant – State of Florida, State Board of Accountancy

#### **Professional Affiliations/Community Service**

- ◆ Member of the American Institute of Certified Public Accountants
- ◆ Member of the Florida Institute of Certified Public Accountants
- ◆ Affiliate of the Government Finance Officers Association

#### **Professional Experience**

- ◆ Maritza launched her professional auditing career at Berger, Toombs, Elam, Gaines, & Frank, accumulating over 9 years of expertise in the field
- ◆ Performed over 300 audits of nonprofit and governmental organizations in accordance with Governmental Accounting Auditing Standards (GAAS)
- ◆ Performed Single Audits of nonprofit organizations in accordance with 2 CFR Part 200 Subpart F, Uniform Guidance, Audits of State, Local Governments, and Non-Profit Organizations.

#### **Continuing Professional Education**

- ◆ Mrs. Stonebraker participates in numerous continuing professional education courses provided by nationally recognized sponsors 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**

#### **Jonathan Herman, CPA**

Director – 11 years

#### **Education**

- ◆ University of Central Florida, B.S. – Accounting
- ◆ Florida Atlantic University, MACC

#### **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
- ◆ Affiliate member Government Finance Officers Association

#### **Professional Experience**

- ◆ Over 10 years experience in all phases of public accounting and auditing experience, with a concentration in financial and compliance audits. Mr. Herman has been involved in all phases of the audits listed on the preceding pages.

#### **Continuing Professional Education**

- ◆ Has participated in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments. He has attended courses in those areas over the last two years such as:
  - Governmental Accounting Report and Audit Update
  - Annual 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 – 34 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

## ***Commitment to Quality Service***

### **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**

#### **Paul Daly**

Senior Accountant – 12 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**

#### **Bryan Snyder**

Senior Accountant – 10 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.

## ***Commitment to Quality Service***

<b>Personnel Qualifications and Experience</b>
--

**Tifanee Terrell, CPA**

Senior Accountant – 4 years

**Education**

- ◆ Florida Atlantic University, M.A.C.C. – 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.

## ***Commitment to Quality Service***

### **Personnel Qualifications and Experience**

#### **Dylan Dixon**

Senior Accountant – 3 years

#### **Education**

- ◆ Indian River State College, B.S. – Accounting

#### **Professional Experience**

- ◆ Staff Accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

#### **Continuing Professional Education**

- ◆ Mr. Dixon 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**

#### **Brennen Moore**

Staff Accountant – 2 years

#### **Education**

- ◆ Indian River State College, B.S. – Accounting

#### **Professional Experience**

- ◆ Staff Accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

#### **Continuing Professional Education**

- ◆ Mr. Moore 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**

#### **Katie Gifford**

Staff Accountant – 2 years

#### **Education**

- ◆ Indian River State College, B.S. – Accounting

#### **Professional Experience**

- ◆ Staff Accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

#### **Continuing Professional Education**

- ◆ Ms. Gifford 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**

#### **Rayna Zicari**

Staff Accountant – 2 years

#### **Education**

- ◆ Stetson 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**

- ◆ Ms. Zicari participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.
- ◆ Ms. Zicari is currently working towards completing an additional 30 hours of education to qualify to sit for CPA exam.

## ***Commitment to Quality Service***

### **Personnel Qualifications and Experience**

#### **Deandre McFadden**

Staff Accountant

#### **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**

- ◆ Mr. McFadden participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.



6815 Dairy Road  
Zephyrhills, FL 33542

813.788.2155  
[BodinePerry.com](http://BodinePerry.com)

#### Report on the Firm's System of Quality Control

To the Partners of November 30, 2022  
Berger, Toombs, Elam, Gaines & Frank, CPAs, PL  
and the Peer Review Committee of the Florida Institute of Certified Public Accountants

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, 2022. 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](http://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, 2022, 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, PLC, has received a peer review rating of *pass*.

*Bodine Perry*

Bodine Perry

(BERGER\_REPORT22)



**KD52 COMMUNITY DEVELOPMENT DISTRICT NO. 2  
REQUEST FOR PROPOSALS**

**DISTRICT AUDITING SERVICES FOR FISCAL YEAR 2025  
Pasco County, Florida**

**INSTRUCTIONS TO PROPOSERS**

**SECTION 1. DUE DATE.** Sealed proposals must be received no later than May 5, 2025, at 12:00 p.m., at the offices of District Manager, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431, (561) 571-0010. 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) unbound and one (1) electronic 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 – KD52 Community Development District No. 2" 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 (the "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 for the District's first audit for which there are no special assessment bonds, plus the lump sum cost of two (2) annual renewals, which renewals shall include services related to the District's anticipated issuance of special assessment bonds.

**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.

**KD52 COMMUNITY DEVELOPMENT DISTRICT NO. 2  
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 workload; 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.

**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.

**KD52**

**COMMUNITY DEVELOPMENT DISTRICT**

**No. 2**

**7C11**



**Grau & Associates**  
CERTIFIED PUBLIC ACCOUNTANTS

# Proposal to Provide Financial Auditing Services:

**KD52 No 2**

**Community Development District**

Proposal Due: May 5, 2025  
12:00PM

**Submitted to:**

KD52 No. 2  
Community Development District  
c/o District Manager  
2300 Glades Road, Suite 410W  
Boca Raton, Florida 33431

---

**Submitted by:**

Antonio J. Grau, Partner  
Grau & Associates  
1001 W. Yamato Road, Suite 301  
Boca Raton, Florida 33431

**Tel** (561) 994-9299  
(800) 229-4728

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# Grau & Associates

CERTIFIED PUBLIC ACCOUNTANTS

May 5, 2025

KD52 No. 2 Community Development District  
c/o District Manager  
2300 Glades Road, Suite 410W  
Boca Raton, Florida 33431

Re: Request for Proposal for Professional Auditing Services for the fiscal year ended September 30, 2025, with an option for two (2) additional annual renewals.

Grau & Associates (Grau) welcomes the opportunity to respond to the KD52 No. 2 Community Development District's (the "District") Request for Proposal (RFP), and we look forward to working with you on your audit. We are an energetic and robust team of knowledgeable professionals and are a recognized leader of providing services to Community Development Districts. As one of Florida's few firms to primarily focus on government, we are especially equipped to provide you an effective and efficient audit.

Government audits are at the core of our practice: **95% of our work is performing audits for local governments and of that 98% are for special districts.** With our significant experience, we are able to increase efficiency, to provide immediate and continued savings, and to minimize disturbances to your operations.

## Why Grau & Associates:

### Knowledgeable Audit Team

Grau is proud that the personnel we assign to your audit are some of the most seasoned auditors in the field. Our staff performs governmental engagements year-round. When not working on your audit, your team is refining their audit approach for next year's audit. Our engagement partners have decades of experience and take a hands-on approach to our assignments, which all ensures a smoother process for you.

### Servicing your Individual Needs

Our clients enjoy personalized service designed to satisfy their unique needs and requirements. Throughout the process of our audit, you will find that we welcome working with you to resolve any issues as swiftly and easily as possible. In addition, due to Grau's very low turnover rate for our industry, you also won't have to worry about retraining your auditors from year to year.

### Developing Relationships

We strive to foster mutually beneficial relationships with our clients. We stay in touch year-round, updating, collaborating and assisting you in implementing new legislation, rules and standards that affect your organization. We are also available as a sounding board and assist with technical questions.

### Maintaining an Impeccable Reputation

We have never been involved in any litigation, proceeding or received any disciplinary action. Additionally, we have never been charged with, or convicted of, a public entity crime of any sort. We are financially stable and have never been involved in any bankruptcy proceedings.

### **Complying With Standards**

Our audit will follow the Auditing Standards of the AICPA, Generally Accepted Government Auditing Standards, issued by the Comptroller General of the United States, and the Rules of the Auditor General of the State of Florida, and any other applicable federal, state and local regulations. We will deliver our reports in accordance with your requirements.

This proposal is a firm and irrevocable offer for 90 days. We certify this proposal is made without previous understanding, agreement or connection either with any previous firms or corporations offering a proposal for the same items. We also certify our proposal is in all respects fair, without outside control, collusion, fraud, or otherwise illegal action, and was prepared in good faith. Only the person(s), company or parties interested in the project as principals are named in the proposal. Grau has no existing or potential conflicts and anticipates no conflicts during the engagement. Our Federal I.D. number is 20-2067322.

We would be happy to answer any questions or to provide any additional information. We are genuinely excited about the prospect of serving you and establishing a long-term relationship. Please do not hesitate to call or email either of our Partners, Antonio J. Grau, CPA ([tgrau@graucpa.com](mailto:tgrau@graucpa.com)) or David Caplivski, CPA ([dcaplivski@graucpa.com](mailto:dcaplivski@graucpa.com)) at 561.994.9299. We thank you for considering our firm's qualifications and experience.

Very truly yours,  
Grau & Associates



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Antonio J. Grau

# Firm Qualifications



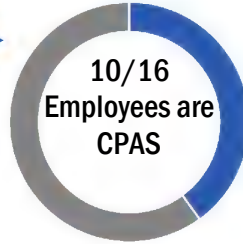
**Grau & Associates**  
CERTIFIED PUBLIC ACCOUNTANTS

# Grau's Focus and Experience

## Our Team



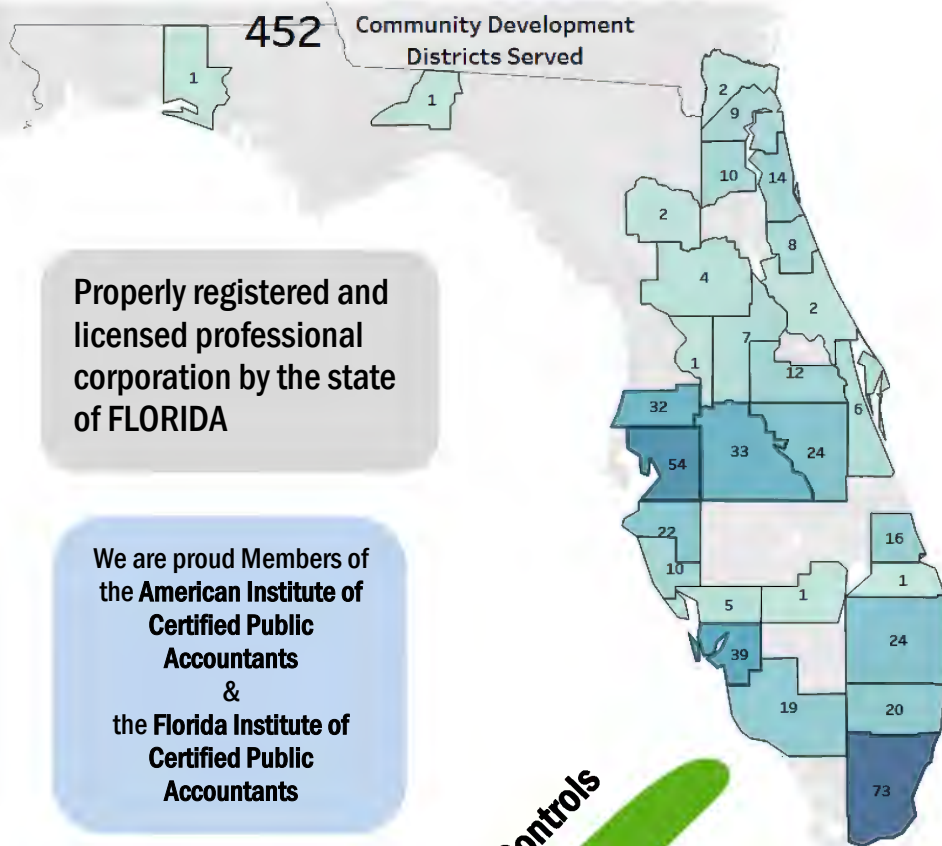
**3** Partners  
**11** Professional Staff  
**2** Administrative Professionals



# 2005

Year founded

## Services Provided



Properly registered and licensed professional corporation by the state of FLORIDA

We are proud Members of the **American Institute of Certified Public Accountants** & the **Florida Institute of Certified Public Accountants**



- ⇒ External quality review program: consistently receives a pass
- ⇒ Internal: ongoing monitoring to maintain quality



AICPA | FICPA | GFOA | FASD | FGFOA

See next page for report and certificate



Florida Institute of Certified Public Accountants

**FICPA Peer Review Program**  
Administered in Florida  
by The Florida Institute of CPAs



Peer Review  
Program

**AICPA Peer Review Program**  
Administered in Florida  
by the Florida Institute of CPAs

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**March 17, 2023**

**Antonio Grau**  
**Grau & Associates**  
951 Yamato Rd Ste 280  
Boca Raton, FL 33431-1809

**Dear Antonio Grau:**

It is my pleasure to notify you that on March 16, 2023, the Florida Peer Review Committee accepted the report on the most recent System Review of your firm. The due date for your next review is December 31, 2025. This is the date by which all review documents should be completed and submitted to the administering entity.

As you know, the report had a peer review rating of pass. The Committee asked me to convey its congratulations to the firm.

Thank you for your cooperation.

Sincerely,

*FICPA Peer Review Committee*

Peer Review Team  
FICPA Peer Review Committee

850.224.2727, x5957

cc: Daniel Hevia, Racquel McIntosh

Firm Number: 900004390114

Review Number: 594791

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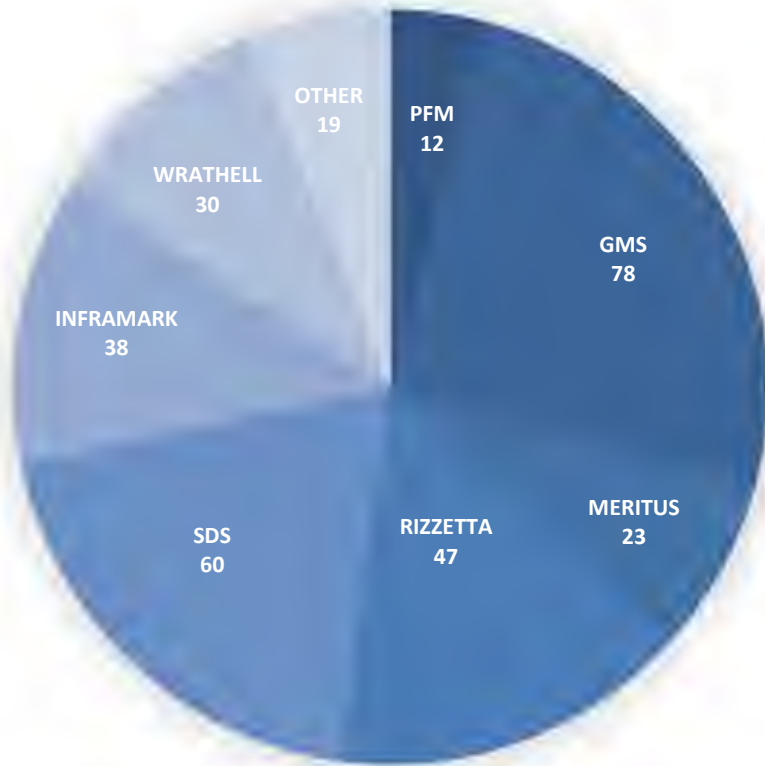
119 S Monroe Street, Suite 121 | Tallahassee, FL 32301 | 850.224.2727, in Florida | [www.ficpa.org](http://www.ficpa.org)

# **Firm & Staff Experience**



**Grau & Associates**  
CERTIFIED PUBLIC ACCOUNTANTS

## GRAU AND ASSOCIATES COMMUNITY DEVELOPMENT DISTRICT EXPERIENCE BY MANAGEMENT COMPANY



### *Profile Briefs:*

**Antonio J GRAU, CPA (Partner)**

*Years Performing Audits: 35+  
CPE (last 2 years): Government Accounting, Auditing: 40 hours; Accounting, Auditing and Other: 53 hours  
Professional Memberships: AICPA, FICPA, FGFOA, GFOA*

**David Caplivski, CPA (Partner)**

*Years Performing Audits: 13+  
CPE (last 2 years): Government Accounting, Auditing: 24 hours; Accounting, Auditing and Other: 64 hours  
Professional Memberships: AICPA, FICPA, FGFOA, FASD*

“Here at Grau & Associates, staying up to date with the current technological landscape is one of our top priorities. Not only does it provide a more positive experience for our clients, but it also allows us to perform a more effective and efficient audit. With the every changing technology available and utilized by our clients, we are constantly innovating our audit process.”

- Tony Grau

“Quality audits and exceptional client service are at the heart of every decision we make. Our clients trust us to deliver a quality audit, adhering to high standards and assisting them with improvements for their organization.”

-David Caplivski

## YOUR ENGAGEMENT TEAM

Grau's client-specific engagement team is meticulously organized in order to meet the unique needs of each client. Constant communication within our solution team allows for continuity of staff and audit team. The Certified Information Technology Professional (CITP) Partner will bring a unique blend of IT expertise and understanding of accounting principles to the financial statement audit of the District.



The assigned personnel will work closely with the partner and the District to ensure that the financial statements and all other reports are prepared in accordance with professional standards and firm policy. Responsibilities will include planning the audit; communicating with the client and the partners the progress of the audit; and determining that financial statements and all reports issued by the firm are accurate, complete and are prepared in accordance with professional standards and firm policy.

The Engagement Partner will participate extensively during the various stages of the engagement and has direct responsibility for engagement policy, direction, supervision, quality control, security, confidentiality of information of the engagement and communication with client personnel. The engagement partner will also be involved directing the development of the overall audit approach and plan; performing an overriding review of work papers and ascertain client satisfaction.



# Antonio 'Tony' J. Grau, CPA Partner

Contact: [tgrau@graucpa.com](mailto:tgrau@graucpa.com) | (561) 939-6672

## Experience

For over 30 years, Tony has been providing audit, accounting and consulting services to the firm's governmental, non-profit, employee benefit, overhead and arbitrage clients. He provides guidance to clients regarding complex accounting issues, internal controls and operations.

As a member of the Government Finance Officers Association Special Review Committee, Tony participated in the review process for awarding the GFOA Certificate of Achievement in Financial Reporting. Tony was also the review team leader for the Quality Review of the Office of Management Audits of School Board of Miami-Dade County. Tony received the AICPA advanced level certificate for governmental single audits.

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## Education

University of South Florida (1983)  
Bachelor of Arts  
Business Administration

## Clients Served (partial list)

(>300) Various Special Districts, including:

- |  |  |
|--|--|
| Bayside Improvement Community Development District   | St. Lucie West Services District                 |
| Dunes Community Development District                 | Ave Maria Stewardship Community District         |
| Fishhawk Community Development District (I, II, IV)  | Rivers Edge II Community Development District    |
| Grand Bay at Doral Community Development District    | Bartram Park Community Development District      |
| Heritage Harbor North Community Development District | Bay Laurel Center Community Development District |
|  |  |
| Boca Raton Airport Authority                         |  |
| Greater Naples Fire Rescue District                  |  |
| Key Largo Wastewater Treatment District              |  |
| Lake Worth Drainage District                         |  |
| South Indian River Water Control                     |  |

## Professional Associations/Memberships

American Institute of Certified Public Accountants    Florida Government Finance Officers Association  
Florida Institute of Certified Public Accountants    Government Finance Officers Association Member  
City of Boca Raton Financial Advisory Board Member

## Professional Education (over the last two years)

<u>Course</u>	<u>Hours</u>
Government Accounting and Auditing	40
Accounting, Auditing and Other	53
Total Hours	<u>93</u> (includes of 4 hours of Ethics CPE)



**David Caplivski, CPA/CITP, Partner**  
 Contact : [dcaplivski@graucpa.com](mailto:dcaplivski@graucpa.com) / 561-939-6676

**Experience**

Grau & Associates	Partner	2021-Present
Grau & Associates	Manager	2014-2020
Grau & Associates	Senior Auditor	2013-2014
Grau & Associates	Staff Auditor	2010-2013

**Education**

Florida Atlantic University (2009)  
 Master of Accounting  
 Nova Southeastern University (2002)  
 Bachelor of Science  
 Environmental Studies

**Certifications and Certificates**

Certified Public Accountant (2011)  
 AICPA Certified Information Technology Professional (2018)  
 AICPA Accreditation COSO Internal Control Certificate (2022)

**Clients Served (partial list)**

(>300) Various Special Districts	Hispanic Human Resource Council
Aid to Victims of Domestic Abuse	Loxahatchee Groves Water Control District
Boca Raton Airport Authority	Old Plantation Water Control District
Broward Education Foundation	Pinetree Water Control District
CareerSource Brevard	San Carlos Park Fire & Rescue Retirement Plan
CareerSource Central Florida 403 (b) Plan	South Indian River Water Control District
City of Lauderhill GERS	South Trail Fire Protection & Rescue District
City of Parkland Police Pension Fund	Town of Haverhill
City of Magnolia Island GERS	Town of Hypoluxo
Coquina Water Control District	Town of Hillsboro Beach
Central County Water Control District	Town of Lantana
City of Miami (program specific audits)	Town of Lauderdale By-The-Sea Volunteer Fire Pension
City of West Park	Town of Pembroke Park
Coquina Water Control District	Village of Wellington
East Central Regional Wastewater Treatment Fac.	Village of Golf
East Naples Fire Control & Rescue District	

**Professional Education (over the last two years)**

<u>Course</u>	<u>Hours</u>
Government Accounting and Auditing	24
Accounting, Auditing and Other	64
Total Hours	<u>88</u> (includes 4 hours of Ethics CPE)

**Professional Associations**

*Member, American Institute of Certified Public Accountants*  
*Member, Florida Institute of Certified Public Accountants*  
*Member, Florida Government Finance Officers Association*  
*Member, Florida Association of Special Districts*

# References



**Grau & Associates**  
CERTIFIED PUBLIC ACCOUNTANTS

We have included three references of government engagements that require compliance with laws and regulations, follow fund accounting, and have financing requirements, which we believe are similar to the District.

### Dunes Community Development District

<b>Scope of Work</b>	Financial audit
<b>Engagement Partner</b>	Antonio J. Grau
<b>Dates</b>	Annually since 1998
<b>Client Contact</b>	Darrin Mossing, Finance Director 475 W. Town Place, Suite 114 St. Augustine, Florida 32092 904-940-5850

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### Two Creeks Community Development District

<b>Scope of Work</b>	Financial audit
<b>Engagement Partner</b>	Antonio J. Grau
<b>Dates</b>	Annually since 2007
<b>Client Contact</b>	William Rizzetta, President 3434 Colwell Avenue, Suite 200 Tampa, Florida 33614 813-933-5571

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### Journey's End Community Development District

<b>Scope of Work</b>	Financial audit
<b>Engagement Partner</b>	Antonio J. Grau
<b>Dates</b>	Annually since 2004
<b>Client Contact</b>	Todd Wodraska, Vice President 2501 A Burns Road Palm Beach Gardens, Florida 33410 561-630-4922

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# **Specific Audit Approach**



**Grau & Associates**  
CERTIFIED PUBLIC ACCOUNTANTS

# **AUDIT APPROACH**

## **Grau's Understanding of Work Product / Scope of Services:**

We recognize the District is an important entity and we are confident our firm is eminently qualified to meet the challenges of this engagement and deliver quality audit services. ***You would be a valued client of our firm and we pledge to commit all firm resources to provide the level and quality of services (as described below) which not only meet the requirements set forth in the RFP but will exceed those expectations.*** Grau & Associates fully understands the scope of professional services and work products requested. Our audit will follow the Auditing Standards of the AICPA, *Generally Accepted Government Auditing Standards*, issued by the Comptroller General of the United States, and the Rules of the Auditor General of the State of Florida and any other applicable Federal, State or Local regulations. **We will deliver our reports in accordance with your requirements.**

## **Proposed segmentation of the engagement**

Our approach to the audit engagement is a risk-based approach which integrates the best of traditional auditing techniques and a total systems concept to enable the team to conduct a more efficient and effective audit. The audit will be conducted in three phases, which are as follows:



### **Phase I - Preliminary Planning**

A thorough understanding of your organization, service objectives and operating environment is essential for the development of an audit plan and for an efficient, cost-effective audit. During this phase, we will meet with appropriate personnel to obtain and document our understanding of your operations and service objectives and, at the same time, give you the opportunity to express your expectations with respect to the services that we will provide. Our work effort will be coordinated so that there will be minimal disruption to your staff.

#### **During this phase we will perform the following activities:**

- » Review the regulatory, statutory and compliance requirements. This will include a review of applicable federal and state statutes, resolutions, bond documents, contracts, and other agreements;
- » Read minutes of meetings;
- » Review major sources of information such as budgets, organization charts, procedures, manuals, financial systems, and management information systems;
- » Obtain an understanding of fraud detection and prevention systems;
- » Obtain and document an understanding of internal control, including knowledge about the design of relevant policies, procedures, and records, and whether they have been placed in operation;
- » Assess risk and determine what controls we are to rely upon and what tests we are going to perform and perform test of controls;
- » Develop audit programs to incorporate the consideration of financial statement assertions, specific audit objectives, and appropriate audit procedures to achieve the specified objectives;
- » Discuss and resolve any accounting, auditing and reporting matters which have been identified.

## Phase II – Execution of Audit Plan

The audit team will complete a major portion of transaction testing and audit requirements during this phase. The procedures performed during this period will enable us to identify any matter that may impact the completion of our work or require the attention of management. Tasks to be performed in Phase II include, but are not limited to the following:

- » Apply analytical procedures to further assist in the determination of the nature, timing, and extent of auditing procedures used to obtain evidential matter for specific account balances or classes of transactions;
- » Perform tests of account balances and transactions through sampling, vouching, confirmation and other analytical procedures; and
- » Perform tests of compliance.

## Phase III - Completion and Delivery

In this phase of the audit, we will complete the tasks related to year-end balances and financial reporting. All reports will be reviewed with management before issuance, and the partners will be available to meet and discuss our report and address any questions. Tasks to be performed in Phase III include, but are not limited to the following:

- » Perform final analytical procedures;
- » Review information and make inquiries for subsequent events; and
- » Meeting with Management to discuss preparation of draft financial statements and any potential findings or recommendations.

You should expect more from your accounting firm than a signature in your annual financial report. Our concept of truly responsive professional service emphasizes taking an active interest in the issues of concern to our clients and serving as an effective resource in dealing with those issues. In following this approach, we not only audit financial information with hindsight but also consider the foresight you apply in managing operations.

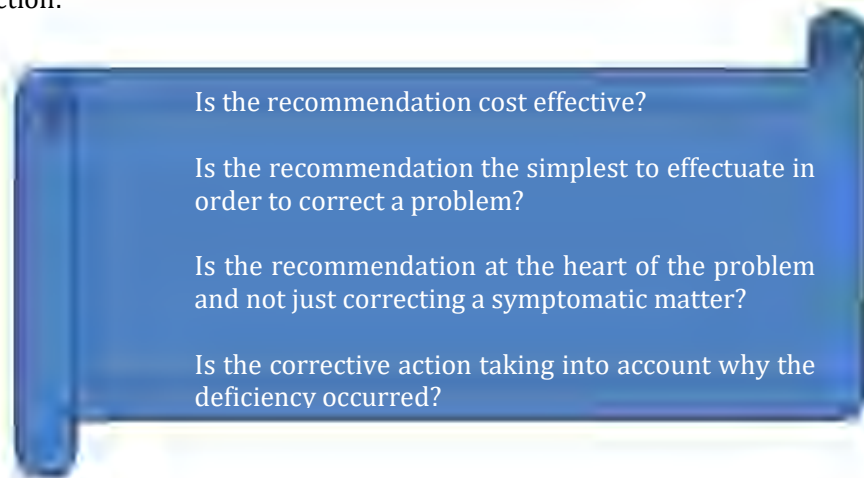
Application of this approach in developing our management letter is particularly important given the increasing financial pressures and public scrutiny facing today's public officials. We will prepare the management letter at the completion of our final procedures.

In preparing this management letter, we will initially review any draft comments or recommendations with management. In addition, we will take necessary steps to ensure that matters are communicated to those charged with governance.

In addition to communicating any recommendations, we will also communicate the following, if any:

- » Significant audit adjustments;
- » Significant deficiencies or material weaknesses;
- » Disagreements with management; and
- » Difficulties encountered in performing the audit.

Our findings will contain a statement of condition describing the situation and the area that needs strengthening, what should be corrected and why. Our suggestions will withstand the basic tests of corrective action:



To assure full agreement with facts and circumstances, we will fully discuss each item with Management prior to the final exit conference. This policy means there will be no “surprises” in the management letter and fosters a professional, cooperative atmosphere.

### **Communications**

We emphasize a continuous, year-round dialogue between the District and our management team. We regularly communicate through personal telephone calls and electronic mail throughout the audit and on a regular basis.

Our clients have the ability to transmit information to us on our secure client portal with the ability to assign different staff with separate log on and viewing capability. This further facilitates efficiency as all assigned users receive electronic mail notification as soon as new information has been posted into the portal.

# Cost of Services



**Grau & Associates**  
CERTIFIED PUBLIC ACCOUNTANTS

Our proposed all-inclusive fees for the financial audit for the fiscal years ended September 30, 2025-2027 are as follows:

<b>Year Ended September 30,</b>	<b>Fee</b>
2025	\$3,200
2026	\$3,300
2027	<u>\$3,400</u>
<b>TOTAL (2025-2027)</b>	<b><u>\$9,900</u></b>

The above fees are based on the assumption that the District maintains its current level of operations. Should conditions change or Bonds are issued the fees would be adjusted accordingly upon approval from all parties concerned. If Bonds are issued the fee would increase by \$1,500. The fee for subsequent annual renewals would be agreed upon separately.

# Supplemental Information



**Grau & Associates**  
CERTIFIED PUBLIC ACCOUNTANTS

## PARTIAL LIST OF CLIENTS

<b>SPECIAL DISTRICTS</b>	<b>Governmental Audit</b>	<b>Single Audit</b>	<b>Utility Audit</b>	<b>Current Client</b>	<b>Year End</b>
Boca Raton Airport Authority	✓	✓		✓	9/30
Captain's Key Dependent District	✓			✓	9/30
Central Broward Water Control District	✓			✓	9/30
Collier Mosquito Control District	✓			✓	9/30
Coquina Water Control District	✓			✓	9/30
East Central Regional Wastewater Treatment Facility	✓		✓		9/30
Florida Green Finance Authority	✓				9/30
Greater Boca Raton Beach and Park District	✓			✓	9/30
Greater Naples Fire Control and Rescue District	✓	✓		✓	9/30
Green Corridor P.A.C.E. District	✓			✓	9/30
Hobe-St. Lucie Conservancy District	✓			✓	9/30
Indian River Farms Water Control District	✓			✓	9/30
Indian River Mosquito Control District	✓				9/30
Indian Trail Improvement District	✓			✓	9/30
Key Largo Wastewater Treatment District	✓	✓	✓	✓	9/30
Lake Asbury Municipal Service Benefit District	✓			✓	9/30
Lake Padgett Estates Independent District	✓			✓	9/30
Lake Worth Drainage District	✓			✓	9/30
Lealman Special Fire Control District	✓			✓	9/30
Loxahatchee Groves Water Control District	✓				9/30
Old Plantation Water Control District	✓			✓	9/30
Pal Mar Water Control District	✓			✓	9/30
Pinellas Park Water Management District	✓			✓	9/30
Pine Tree Water Control District (Broward)	✓			✓	9/30
Pinetree Water Control District (Wellington)	✓				9/30
Port of The Islands Community Improvement District	✓		✓	✓	9/30
Ranger Drainage District	✓	✓		✓	9/30
Renaissance Improvement District	✓			✓	9/30
San Carlos Park Fire Protection and Rescue Service District	✓			✓	9/30
Sanibel Fire and Rescue District	✓				9/30
South Central Regional Wastewater Treatment and Disposal Board	✓				9/30
South Indian River Water Control District	✓	✓		✓	9/30
South Trail Fire Protection & Rescue District	✓			✓	9/30
Spring Lake Improvement District	✓			✓	9/30
St. Lucie West Services District	✓		✓	✓	9/30
Sunrise Lakes Phase IV Recreation District	✓			✓	9/30
Sunshine Water Control District	✓			✓	9/30
Sunny Hills Units 12-15 Dependent District	✓			✓	9/30
West Villages Improvement District	✓			✓	9/30
Various Community Development Districts (452)	✓			✓	9/30
<b>TOTAL</b>	<b>491</b>	<b>5</b>	<b>4</b>	<b>484</b>	

## **ADDITIONAL SERVICES**

### **CONSULTING / MANAGEMENT ADVISORY SERVICES**

Grau & Associates also provide a broad range of other management consulting services. Our expertise has been consistently utilized by Governmental and Non-Profit entities throughout Florida. Examples of engagements performed are as follows:

- Accounting systems
- Development of budgets
- Organizational structures
- Financing alternatives
- IT Auditing
- Fixed asset records
- Cost reimbursement
- Indirect cost allocation
- Grant administration and compliance

### **ARBITRAGE**

The federal government has imposed complex rules to restrict the use of tax-exempt financing. Their principal purpose is to eliminate any significant arbitrage incentives in a tax-exempt issue. We have determined the applicability of these requirements and performed the rebate calculations for more than 150 bond issues, including both fixed and variable rate bonds.

**73**

Current  
Arbitrage  
Calculations

**We look forward to providing **KD52 No. 2 Community Development District** with our resources and experience to accomplish not only those minimum requirements set forth in your Request for Proposal, but to exceed those expectations!**

**For even more information on Grau & Associates  
please visit us on [www.graucpa.com](http://www.graucpa.com).**

**KD52**

**COMMUNITY DEVELOPMENT DISTRICT**

**No. 2**

**7D**

## KD52 COMMUNITY DEVELOPMENT DISTRICT No. 2

### 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
<b>PROPOSER</b>	<b>20 POINTS</b>	<b>20 POINTS</b>	<b>20 POINTS</b>	<b>20 POINTS</b>	<b>20 POINTS</b>	<b>100 POINTS</b>
<b>Berger, Toombs, Elam, Gaines &amp; Frank</b>						
<b>Grau &amp; Associates</b>						

NOTES:

Completed by: \_\_\_\_\_

Board Member's Signature

Date: \_\_\_\_\_

\_\_\_\_\_  
Printed Name of Board Member

**KD52**

**COMMUNITY DEVELOPMENT DISTRICT**

**No. 2**

**10**

**KD52**

**COMMUNITY DEVELOPMENT DISTRICT**

**No. 2**

**10A**

35601

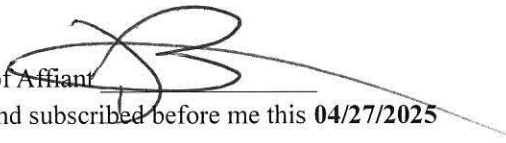
# Tampa Bay Times

Published Daily

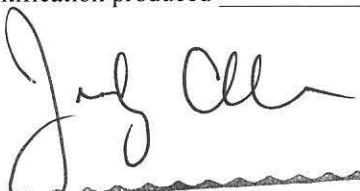
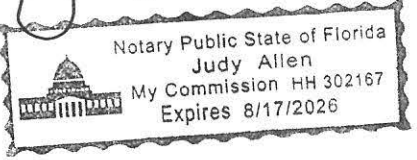
STATE OF FLORIDA } ss  
COUNTY OF PASCO County

Before the undersigned authority personally appeared Deirdre Bonett who on oath says that he/she is a Legal Advertising Representative of the Tampa Bay Times a daily newspaper printed in St. Petersburg, in Pasco County, Florida that the attached copy of advertisement being a Legal Notice in the matter RFQ for Engineering Svc was published in said newspaper by print in the issues of 04/27/25 or by publication on the newspaper's website, if authorized.

Affiant further says that the website or newspaper complies with all legal requirements for publication in chapter 50, Florida Statutes. Affiant further says the said Tampa Bay Times is a newspaper published in Pasco County, Florida and that the said newspaper has heretofore been continuously published in said Pasco County, Florida each day and has been entered as a second class mail matter at the post office in said Pasco County, Florida for a period of one year next preceding the first publication of the attached copy of advertisement, and affiant further says that he/she 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.

  
Signature of Affiant  
Sworn to and subscribed before me this **04/27/2025**

Signature of Notary of Public  
Personally known  or produced identification.  
Type of identification produced \_\_\_\_\_

**REQUEST FOR QUALIFICATIONS FOR ENGINEERING SERVICES  
FOR THE KD52 COMMUNITY DEVELOPMENT DISTRICT NO. 2**

*RFQ for Engineering Services*

The KD52 Community Development District No. 2 ("District"), located in Pasco County, Florida, announces that professional engineering services will be required on a continuing basis for the District's capital improvement plan, including stormwater management system, landscaping improvements, utilities, roadway improvements, 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 Pasco County, Florida; 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. 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 one (1) unbound and (1) electronic copy of Standard Form No. 330 and Qualification Statement by 12:00 p.m. on May 12, 2025 to the attention of Cindy Cerbone, Wrathell Hunt & Associates, LLC, 2300 Glades Road, Suite 410W, Boca Raton, Florida 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 for a continuing contract. 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) calendar hours (excluding Saturdays, Sundays, and state holidays) 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 (including Saturdays, Sundays, 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 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 proposed Rules of Procedure, which are available from the District Manager.

April 27, 2025 35601

**KD52**

**COMMUNITY DEVELOPMENT DISTRICT**

**No. 2**

**10B**

**REQUEST FOR QUALIFICATIONS FOR ENGINEERING SERVICES  
FOR THE KD52 COMMUNITY DEVELOPMENT DISTRICT NO. 2**

*RFQ for Engineering Services*

The KD52 Community Development District No. 2 (“**District**”), located in Pasco County, Florida, announces that professional engineering services will be required on a continuing basis for the District’s capital improvement plan, including stormwater management system, landscaping improvements, utilities, roadway improvements, 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 Pasco County, Florida; 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. 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 one (1) unbound and (1) electronic copy of Standard Form No. 330 and Qualification Statement by 12:0 p.m. on May 12, 2025 to the attention of Cindy Cerbone, Wrathell Hunt & Associates, LLC, 2300 Glades Road, Suite 410W, Boca Raton, Florida 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 for a continuing contract. 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) calendar hours (excluding Saturdays, Sundays, and state holidays) 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 (including Saturdays, Sundays, 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 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 proposed Rules of Procedure, which are available from the District Manager.

## **KD52 COMMUNITY DEVELOPMENT DISTRICT NO. 2**

### **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.

**KD52**

**COMMUNITY DEVELOPMENT DISTRICT**

**No. 2**

**10C**

**KD52**

**COMMUNITY DEVELOPMENT DISTRICT**

**No. 2**

**10CI**

# RESPONSE TO REQUEST FOR QUALIFICATIONS FOR ENGINEERING SERVICES

May 12, 2025

## Prepared for:

KD52 District No. 2  
Community Development District

Pasco, Florida



## Prepared by:



**ALLIANT**

3901 Coconut Palm Drive, Suite 102  
Tampa, Florida 33619  
813.940.3465 MAIN  
alliant-inc.com

Ms. Cindy Cerbone  
*District Manager*  
Wrathel, Hunt, & Associates, LLC  
2300 Glades Road, Suite 410W  
Boca Raton, Florida 33431

Dear Ms. Cerbone and Members of the Evaluation Committee:

**Alliant Engineering, Inc.** (Alliant) is a local and highly experienced firm that is perfectly suited to provide professional engineering services to the **KD52 District No. 2 Community Development District**. Our Senior Civil Engineer, **Jeff Sprouse, PE** of our Tampa Office will serve as the Client Manager and be the district's main point of contact.

Alliant's proposed team of professionals provides the district with a comprehensive understanding and approach to meet (and exceed) the district's objectives and goals. Our corporate mission to build better communities with excellence and passion is evident within our culture and separates us from the rest.

Alliant, headquartered in Minneapolis, MN, was established in 1995 and has since expanded to over 200 professionals and support staff. Serving clients like the **KD52 District No. 2 Community Development District**, Alliant extended its reach to Jacksonville, Florida in 2015 and Tampa, Florida in 2023. Alliant is an S-Corporation and offers a comprehensive range of services including, but not limited to civil engineering, construction services, transportation systems, traffic engineering, land surveying, landscape architecture, roadway design, and water resources. Our team offers the district the following benefits:

**CLIENT AND PROJECT LEADERSHIP.** The Union Park East Community Development District seeks a consultant partner who goes beyond mere design and engineering. You need a leader capable of managing projects from inception to completion, adept at addressing challenges efficiently. In Jeff's role as Client Manager, he'll be your main contact ensuring our team remains focused, adaptable, and responsive to the district's needs. We prioritize timely, transparent communication and aim for quality throughout every phase, from project initiation to bidding, construction, and closeout.

**SUCCESSFUL TRACK RECORD.** Alliant has been serving municipal clients in Florida since the opening of our Jacksonville office. We are proud of the relationships we have built with our clients and encourage you to contact our references in our project experience section for feedback on our commitment to quality and exceptional service. Mr. Sprouse has extensive experience in construction supervision and project management for roadway, water, sanitary sewer, drainage, and structural projects. He's served as both a Client Manager and Design Engineer on numerous similar projects, combining technical knowledge with hands-on leadership.

**DEDICATED CORE TEAMS.** We provide a skilled team of engineers to the district, ensuring a blend of specialized knowledge, hands-on experience, and innovative thinking. By aligning the right expertise with each project, we aim to enhance the quality of life across Florida through high-quality engineering services delivered within budget and schedule constraints, while prioritizing exceptional client service. Our team is committed and available to serve the district.

We are excited to serve the **KD52 District No. 2 Community Development District** for continuing professional engineering services. Please feel free to contact me with any questions or if you require additional information.

Sincerely, **Alliant Engineering, Inc.**



**Wayne "Jeff" Sprouse, PE**, *Client Manager*

☎ 813.954.4337 ✉ [jsprouse@alliant-inc.com](mailto:jsprouse@alliant-inc.com)



**Andrew Mansen, PE**, *Project Manager*

☎ 904.329.4001 ✉ [amansen@alliant-inc.com](mailto:amansen@alliant-inc.com)

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Strong relationships are the cornerstone of our business. We’ve seen firsthand how they can result in better project outcomes, which benefit our client’s reputation and future opportunities. We value and protect these relationships, which is why we’ve spent the last 30 years building connections nationwide in the public and private sectors and why our clients continue to choose Alliant for their projects.

Alliant is comprised of individuals from a variety of disciplines, backgrounds, and experience levels. We provide complex engineering and design solutions for projects that need to be completed on schedule and within budget—without sacrificing standards of performance. Together, our employee-owners are committed to excellence, collaboration, and integrity, bringing value to our employees, clients, and communities.

For over 30 years, we have focused on the values that drive our company. Keeping these values at the forefront of everything we do helps us provide opportunities to our employee-owners and serve our clients with the same level of integrity and sense of entrepreneurialism that has defined us for those three-plus decades.

**Alliant’s Team Guiding Principles:**

- ▶ We innovate before, during, and after the design to provide the best solutions for our clients.
- ▶ We communicate with our clients, employees, sub-consultants, and project stakeholders to ensure that our projects stay on task, on schedule, and within budget.
- ▶ We dedicate ourselves to our business and our community.
- ▶ We deliver successful projects.
- ▶ We keep our ear to the rail and our nose to the grindstone.



**COMMUNITY**

Our community is where we live, work and play – it is who we are at Alliant – it is our industry and the world around us.



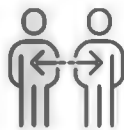
**EXCELLENCE**

It’s about always doing our best and being the best at what we do.



**CREATE VALUE**

By solving challenges and delivering the best solutions, we create value that lives on long after the project is finished.



**COLLABORATION**

To take on the BIG challenges we collaborate with our clients, our partners, and each other.



**FUTURE FOCUSED**

We look forward to the next idea, the next solution, and the next opportunity to build better communities.



**INTEGRITY**

The foundation of our success comes from the trust our clients and partners place with us to do business the right way.

## Brief Description of Services:

### Civil Engineering

- ◆ Site analysis, feasibility, planning
- ◆ Design development / budgeting
- ◆ Stormwater management design
- ◆ Permitting & agency coordination
- ◆ Construction drawings

### Landscape Architecture

- ◆ Master planning
- ◆ Site analysis and planning
- ◆ Agency coordination and submittals
- ◆ Construction drawings

### Land Survey (Alliant Florida, Inc.)

- ◆ Boundary surveys
  - ALTA/NSPS land title surveys
  - Certificate of survey
- ◆ Topographic surveys
  - Design location/existing conditions
  - Hydrographic survey
  - Underground survey (utilities)
- ◆ Record surveys
  - Subdivision
- ◆ Construction surveys
  - Establish horizontal & vertical site control
  - Staking horizontal & vertical site control
  - Volume measurements

### Roadway Design

- ◆ Preliminary design
- ◆ Final design
- ◆ Municipal engineering
- ◆ Local road design
- ◆ Utilities
- ◆ Construction cost estimating
- ◆ Public involvement

### Water Resources

- ◆ Hydrologic & hydraulic modeling
- ◆ Storm sewer design
- ◆ Culvert design
- ◆ Bridge hydraulics
- ◆ Stream restoration
- ◆ Detention design
- ◆ Water quality management
- ◆ Floodplain analysis & permitting

### Construction Services

- ◆ Constructability reviews
- ◆ Contract development
- ◆ Contract administration
- ◆ Construction observation
- ◆ State & federal aid construction documentation
- ◆ Public and private utility coordination

### Traffic Engineering

- ◆ Traffic, parking & specialty studies
- ◆ Bicycle & pedestrian planning & design
- ◆ Traffic signal operations & timing
- ◆ Traffic modeling
- ◆ Intersection & roadway safety studies
- ◆ Intersection control evaluations
- ◆ Traffic final design
- ◆ Project management

### Environmental Services

- ◆ Environmental planning & documentation
- ◆ Wetland delineation
- ◆ Wetland permits
- ◆ Wetland mitigation & monitoring
- ◆ Ecologic restoration
- ◆ Natural resource surveys
- ◆ Invasive species surveys
- ◆ Construction SWPPP design
- ◆ NPDES permit compliance inspection
- ◆ Construction site management plans
- ◆ Tree inventories

**Building Better Communities with Excellence and Passion**

**ENGINEER POINT OF CONTACT AND PROPOSED TEAM**
**Request for Qualifications for Engineering Services for KD52 District No. 2 Community Development District, Pasco County, FL**

Public Notice Date: April 27, 2025

Solicitation No. 35601

**Engineer Point of Contact:**

Jeff Sprouse, PE / Project Manager

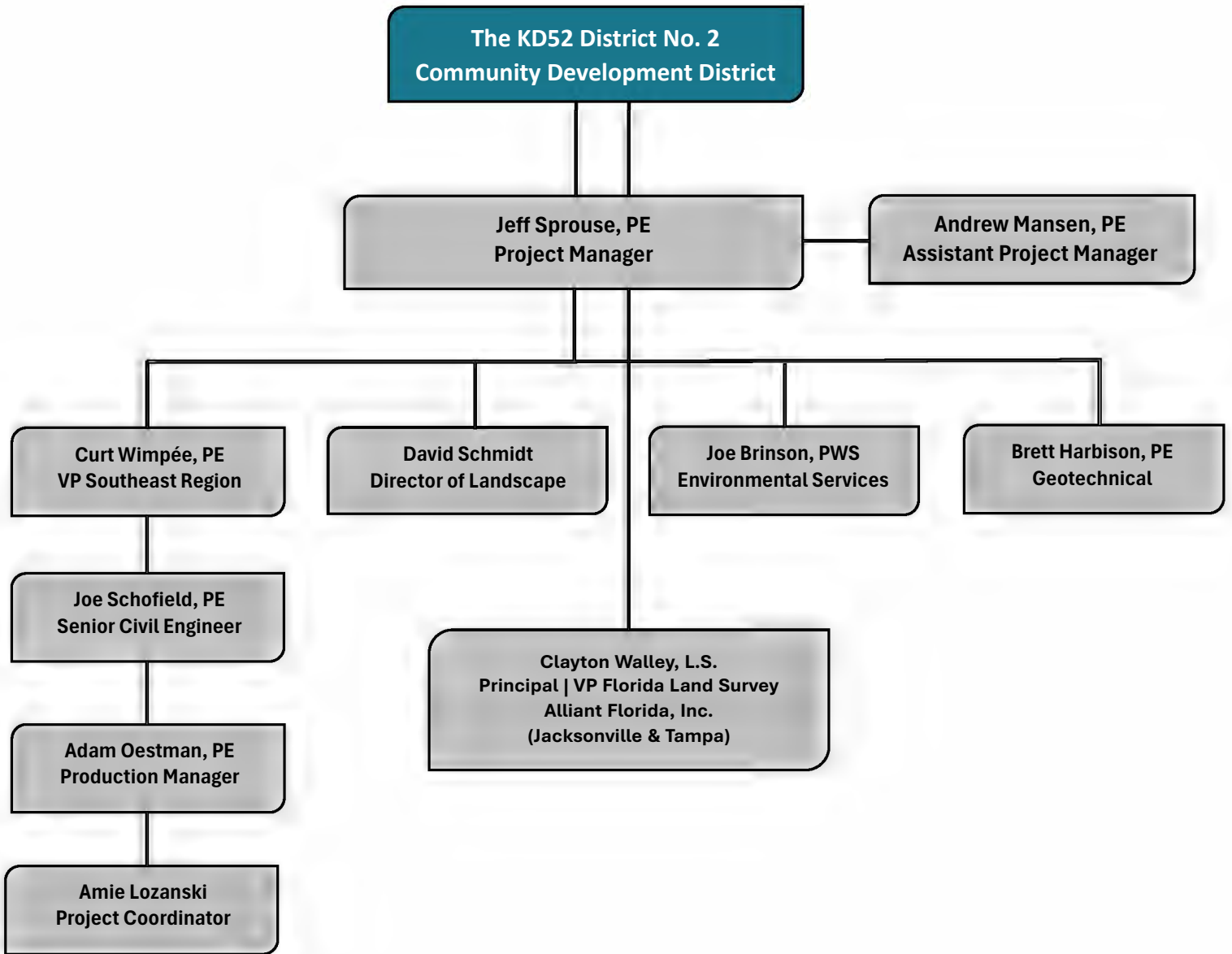
(813) 954-4337

Alliant Engineering, Inc.

[jsprouse@alliant-inc.com](mailto:jsprouse@alliant-inc.com)
**PROPOSED TEAM**

Check		FIRM NAME	ADDRESS	ROLE IN THIS CONTRACT
Prime	Subcontractor			
X		Alliant Engineering	3901 Coconut Palm Drive, Suite 102 Tampa, Florida 33619	Project Management, Civil Engineering, and Landscape Services
	X	ESC Florida, LLC	4524 N. 56th Street Tampa, Florida 33610	Environmental Services
	X	Meskel & Associates Engineering	2202 N. West Shore Boulevard Suite 200 Tampa, Florida 33607	Geotechnical Services
	X	Alliant Florida, Inc. (A wholly owned subsidiary of Alliant Engineering, Inc.)	3901 Coconut Palm Drive, Suite 102 Tampa, Florida 33619	Land Survey Services

**Exhibit 1. Organizational Chart of Proposed Team**



**RESUMES OF KEY PERSONNEL AND RELEVANT PROJECTS**



**Jeff Sprouse, PE**  
Project Manager

**SHANNON ESTATES SUBDIVISION ♦ PLANT CITY, FLORIDA**

This subdivision is on a 6.26-acre lot located along N. Shannon Avenue. The project included 8 lots, access road, stormwater facilities, potable water, reclaimed water, lift station, sanitary sewer, and stormwater system. The site contained 2.65-acres of wetland and was partially located within the 100-year floodplain. The site required permitting with multiple state, city and county departments. Floodplain analysis was performed using SWMM5 for cut and fill calculations to ensure no floodplain impacts and for the design of the stormwater system.

**WEG PARK ROAD COMMERCIAL COMPLEX ♦ PLANT CITY, FLORIDA**

Development of a 15.73-acre site which included a feed store, feed storage buildings, self-storage, RV storage, sidewalks, vehicular use areas and other miscellaneous impervious areas. The site required permitting with multiple state, city and county departments. Floodplain analysis was performed using SWMM5 for cut and fill calculations to ensure no floodplain impacts and for the design of the stormwater system.

**NORTH PARK ROAD COMMERCIAL SUBDIVISION ♦ PLANT CITY, FLORIDA**

This development included a 12.68-acre site located along North Park Road. The project included 5 commercial roads, stormwater facilities, potable water, sanitary sewer, stormwater, and the design of right and left turn lanes on N. Park Road. The site had 4.44-acres of wetland with 0.2-acres of impacts to the wetlands and was partially located within the 100-year floodplain. The site required permitting with multiple state, city and county departments. Floodplain analysis was performed using SWMM5 for cut and fill calculations to ensure no floodplain impacts and for the design of the stormwater system.

**SWAN LAKE VILLAGE – MULTI-FAMILY DEVELOPMENT ♦ LAKELAND, FLORIDA**

This development was a 19.08-acre site located along the south side of Griffin Road. The project included two 3-story apartment buildings which were 15,927 SF each, a 2,802 SF clubhouse with a pool, sidewalks, access roads, stormwater facilities, 3 ponds, potable water, and sanitary sewer. The project included the design of a 24'-0" x 5'-9" arch pipe across the wetland. The site has 5.83-acres of wetland with 0.18-acres of impacts to the wetlands and was partially located within the 100-year floodplain. The site required permitting with multiple state, city and county departments. Floodplain analysis was performed using SWMM5 and ICPR4 to ensure no floodplain impacts and for the design of the stormwater system.

Mr. Sprouse brings over 28 years of diverse experience in design and construction across a wide range of projects. His expertise includes land development, water resources, municipal water systems, sanitary sewer design and rehabilitation, stormwater management, and roadway design and construction. He has also worked on vertical construction, structural fabrication and erection, as well as SCADA system design and integration for sanitary sewer and stormwater treatment facilities, like Alum Injection Systems. In addition, Mr. Sprouse has extensive experience in construction supervision and project management for roadway, water, sanitary sewer, site, drainage, and structural projects. He's served as both a Project Manager and Design Engineer on numerous similar projects, combining technical knowledge with hands-on leadership.

**YEARS EXPERIENCE**

28 years overall, and 1 year with Alliant.

**EDUCATION**

- ♦ BS, Nuclear Engineering, Mississippi State University
- ♦ FDEP Stormwater Management Inspector #40208
- ♦ Advanced MOT Certified
- ♦ 40-Hour OSHA Hazmat Certified
- ♦ US Navy Engineering Lab Technician
- ♦ Nuclear Power Plant Operations

**PROFESSIONAL REGISTRATIONS**

Professional Engineer in Florida (60821)

**RESUMES OF KEY PERSONNEL AND RELEVANT PROJECTS**



**Andrew Mansen, PE**  
Assistant Project Manager

Mr. Mansen is a Civil Engineer with 4 years of experience in civil design. He graduated in 2011 with a BS in Civil Engineering from California State University. He has provided design, review, and/or management on many public and private site development projects in California and Florida.

**YEARS EXPERIENCE**

14 years overall, and 3.5 year with Alliant.

**EDUCATION**

- ◆ BS, Civil Engineering, California State University, Sacramento, CA

**PROFESSIONAL REGISTRATIONS**

Professional Engineer in Florida (91277)

**BARBER POINTE SUBDIVISION ◆ CITY OF MACCLENNY, FLORIDA**

Andrew served as the lead project engineer for the Barber Pointe Subdivision, a 367-unit residential development situated on a hillside in MacClenny, Florida. He played a central role in all aspects of the civil engineering design, which included developing 13 cascading stormwater ponds to address the site's challenging topography. Andrew designed over 16,500 feet of right-of-way infrastructure and oversaw utility layouts that included 17,500 feet of water mains, 14,500 feet of stormwater pipe with 170 structures, and 15,500 feet of sanitary sewer pipe with 69 structures. He also led the design of offsite improvements, including turn lane modifications and a 5,300-foot municipal force main extension connecting to the City's water treatment plant.

**GROVELAND RETAIL DEVELOPMENT ◆ CITY OF GROVELAND, FLORIDA**

Andrew led civil engineering efforts for the Groveland Retail Development, a 13-acre commercial and light industrial site located in the City of Groveland. His responsibilities included designing infrastructure systems and preparing FDOT-compliant stormwater calculations based on the 100-year storm event. He designed 2,000 feet of water main, 1,200 feet of new force main, and coordinated the relocation of 1,000 feet of existing force main. Andrew also developed plans for offsite roadway improvements, including the addition of turn lanes along US Highway 27 to support increased traffic volumes.

**THE HARBOUR ◆ CITY OF JACKSONVILLE, FLORIDA**

Andrew played a key engineering role in the redevelopment of The Harbour, a 43.8-acre site along the Intracoastal Waterway in Jacksonville. The project involved transforming an aging industrial marina into a vibrant, multi-use waterfront destination. Andrew's work included the design of a fully underground stormwater management system consisting of a 42,000-square-foot chamber system and 5,800 feet of chamber underdrain system, complemented by 6,000 feet of stormwater piping. He also designed 3,500 feet of sanitary sewer pipe to support the site's diverse uses, which include a 136-slip marina, public boat ramp, boat storage, multiple restaurants, an eight-story apartment building with 560 residences, a multi-story commercial and hotel structure, and dedicated recreational and wetland preservation areas.

**RESUMES OF KEY PERSONNEL AND RELEVANT PROJECTS**



**Joseph Schofield, PE**  
**Senior Civil Engineer**

**SHADOWCREST AT ROLLING HILLS CDD ♦ PHASES 3B & 3D ♦ CITY OF GREEN COVE SPRINGS, FLORIDA**

Mr. Schofield assisted the CDD to secure electrical and landscape maintenance easements. He also reviewed all contractor, vendor, and supplier invoices and pay applications to help ensure proper use of the bond funds. Scope included cost estimating and writing the Engineer’s Report for Shadow Crest phase of the district full planned build-out.

**BEACHVIEW COVE SUBDIVISION ♦ CITY OF ORMOND BEACH, FLORIDA**

Project Manager overseeing design and permitting for a 28-lot single family subdivision with private lift station on A-1-A adjacent to the Atlantic Ocean. All entitlements received and construction is underway. The project includes a planned FPL power pole relocation, work within the coastal construction control line (CCCL), and coordination of turtle friendly street lighting design.

**PONCE PRESERVE SUBDIVISION ♦ CITY OF PALM COAST, FLORIDA**

David served as Pipelines Engineer on this project. Route planning, feasibility, and constructability input to add redundancy to an existing 3,500 LF of 30-inch, 10,050 LF of 42-inch, 53,500 LF of 48-inch, and 5,200 LF of 54-inch large diameter DI transmission force main transporting sewage from ECUA’s Main Street WTP situated along Pensacola Bay to ECUA’s Chemstrand Treatment Plant in Escambia County. For this project David personally participated in team meetings, assisted with route selection, made recommendations in support of and produced route sketches for the project as well as investigating and making recommendations for bypass points of connection between the various force main segments.

**RYAN’S LANDING SUBDIVISION ♦ CITY OF PALM COAST, FLORIDA**

Project Manager overseeing design and permitting for a 95-lot single family subdivision. All entitlements have been received; construction start date is undetermined at this time.

**UNIVERSITY OF FLORIDA CLUBHOUSE ♦ CITY OF JACKSONVILLE, FLORIDA**

Design engineering and project manager for the proposed recreational flex-space building with pool situated on a 2.4-acre parcel of land adjacent to Osprey Village and Osprey Cove. Mr. Schofield’s involvement included oversight of modifications to existing facilities, utility design, drainage design, and coordination of architectural elements in support of production of a seamless construction package.

**NAVFAC MAYPORT WHARF CHARLIE – 2 RENOVATIONS ♦ CITY OF JACKSONVILLE, FLORIDA**

Project engineering overseeing design of a stormwater facility to provide overcompensating treatment that would accommodate expansion of Mayport Naval Station Wharf C-2. The project included installation of a new sheet pile bulkhead, fill of open water, wharf expansion, stormwater facility construction, and dredging activities. Assisted to obtain permit from the Army Corps of Engineers (ACOE) to the foregoing activities.

Mr. Schofield is a Senior Engineer with 21 years of experience in civil design and construction oversight. He has provided design, review, and/or management on hundreds of public and private roadway and site development projects in the southeast United States. He has partnered with dozens of state agencies along with local communities to advance a wide variety of projects to improve transportation infrastructure across the continental United States.

**YEARS EXPERIENCE**

21 years overall, and 3 years with Alliant.

**EDUCATION**

- ♦ MBA, St. Leo University
- ♦ BS, Civil Engineering, University of North Florida (UNF)

**PROFESSIONAL REGISTRATIONS**

Professional Engineer in Florida (69219)

**RESUMES OF KEY PERSONNEL AND RELEVANT PROJECTS**



**Adam Oestman, PE**  
**Production Engineer**

**HYMON CIRCLE DRAINAGE IMPROVEMENTS ♦ CITY OF BUNNELL, FLORIDA**

Design engineer preparing construction documents for a two-phase project in the City of Bunnell, including +/- 2,000 LF of roadside drainage improvements as well as +/- 3,000 LF of existing drainage ditch improvements.

**SHADOWCREST AT ROLLING HILLS SUBDIVISION ♦ CITY OF GREEN COVE SPRINGS, FLORIDA**

Lead design engineer preparing construction documents for a single-family, 247 lot subdivision as well as associated construction administration throughout the project.

**SAWMILL BRANCH SUBDIVISION ♦ MULTIPHASE SUBDIVISION ♦ CITY OF PALM COAST, FLORIDA**

Lead design engineer preparing the construction documents for multiple single family residential subdivision phases totaling over 1,000 lots.

**PANAMA CITY BEACH HEALTH CAMPUS ♦ CITY OF PANAMA CITY BEACH, FLORIDA**

Lead design engineer preparing the construction documents for a phased medical campus as well as associated construction administration throughout the project.

**RECLAIM WATER MAIN EXTENSION ♦ CITY OF DELAND, FLORIDA**

Lead design engineer preparing the construction documents for a +/- 6,000 LF reclaim main extension.

**REVERIE AT PALM COAST CDD ♦ MULTIPHASE SUBDIVISION ♦ CITY OF PALM COAST, FLORIDA**

Preparing construction documents, cost estimate, and associated construction administration for a single-family subdivision with multiple phases for a total of 421 lots.

**EPIC CHURCH ♦ CITY OF PALM COAST, FLORIDA**

Lead design engineer preparing construction documents for a church and associated recreational areas.

**CARMEL COURT TOWNHOMES ♦ CLAY COUNTY, FLORIDA**

Lead design engineer preparing construction documents for a 35-townhome unit site as well as associated construction administration throughout the project.

**LADY LAKE APARTMENTS ♦ TOWN OF LADY LAKE, FLORIDA**

Lead design engineer preparing construction documents for a 330 multi-family units and associated recreation areas.

Mr. Oestman has more than six years' experience in the design and construction of private infrastructure projects. He has worked on numerous developments and infrastructure improvements for commercial, medical, municipal, and residential projects around the country. Typical project requirements are land acquisition, contract review, site assessment, land planning, development cost analysis, scheduling, approval coordination, preparation of contract documents, and construction administration.

**YEARS EXPERIENCE**

6 years overall, and 3 years with Alliant.

**EDUCATION**

- ♦ BS, Civil Engineering, Murray State University

**PROFESSIONAL REGISTRATIONS**

Professional Engineer in Florida (98440)

**RESUMES OF KEY PERSONNEL AND RELEVANT PROJECTS**

**Curt Wimpée, PE**  
**Vice President Southeast Region**

Mr. Wimpée is the VP of the Southeast Region with 28 years of experience in municipal engineering, land development, and transportation. Curt's experience includes localized and regional utility extensions, lift stations, city and DOT roadway reconstructions, new roadways, MOT plans, signage and striping plans, concrete and asphalt pavement design, storm water management systems, regional drainage studies, residential mixed use, and large-scale commercial developments. As Alliant's Principal-in-Charge, his goal is to successfully lead the project design team by using constant communication that establishes clear expectations, well defined goals, and regular accountability. In addition, Curt will work as a liaison between district staff, permitting agencies, and the design team.

**YEARS EXPERIENCE**

29 years overall, 10 years with Alliant.

**EDUCATION**

BS, Civil Engineering  
 University of Minnesota

**PROFESSIONAL REGISTRATIONS**

- Professional Engineer in Florida (79764)
- Minnesota (40487)
- Georgia (031340)
- N. Carolina (053415)
- S. Carolina (41355)
- Tennessee (125610)

**PROFESSIONAL AFFILIATIONS**

American Society of Civil Engineers  
 FCARD  
 NEFBA  
 NAIOP  
 ULI

**CITY ENGINEER (CONSULTANT) ♦ CITY OF BUNNELL, FLORIDA**

Engineer of Record for numerous city infrastructure projects. Projects include roadway paving, assessment, rehabilitation, replacement, stormwater system design and modeling, water main (potable and reclaim) extensions/rehabilitation/replacements, sanitary sewer design and rehabilitation. Cost estimating and engineering reports associated with all aspects of these infrastructure projects. City Council presentations and representation, public messaging, and interaction.

**CITY ENGINEER (CONSULTANT) ♦ CITY OF FLAGLER BEACH, FLORIDA**

Engineer of Record for numerous city infrastructure projects some of which included roadway paving/assessment/rehabilitation/replacement stormwater system design and modeling, water main (potable and reclaim) extensions, rehabilitation, replacements, sanitary sewer design/rehabilitation. Cost estimating and engineering reports associated with all aspects of these infrastructure projects. City Council presentation and representation. Public messaging and interaction.

**CIVIL ENGINEER (CONSULTANT) ♦ TOWN OF ORANGE PARK, FL**

This is an on-going contract with the Town. Projects are based on a work order system. Alliant is currently under contract for a comprehensive assessment of pavement conditions within the Town of Orange Park. The assessment aims to evaluate the current state of pavement infrastructure, identify deficiencies, and recommend appropriate maintenance or rehabilitation strategies in a detailed report.

**CITY ENGINEER (CONSULTANT) ♦ CITY OF JACKSONVILLE BEACH, FL**

City Engineer of Record for numerous city infrastructure projects. Projects included roadway and paving assessment, stormwater design and modeling (potable and reclaim) extensions/rehabilitation/replacements, sanitary sewer design & rehabilitation. Cost estimating and engineering reports associated with all aspects of these infrastructure projects. Council presentations and representation, and public messaging and interaction.

**CITY ENGINEER (CONSULTANT) ♦ CITY OF ATLANTIC BEACH, FL**

Served as Engineer of Record for various city infrastructure projects, including roadway paving, stormwater modeling, watermain and sanitary sewer design, cost estimating, engineering reports, city council presentations and public engagement.

**CITY ENGINEER (CONSULTANT) ♦ CITY OF FERNANDINA BEACH, FL**

Served as Engineer of Record for various city infrastructure projects, including roadway paving, stormwater modeling, watermain and sanitary sewer design, cost estimating, engineering reports, city council presentations and public engagement.

**RESUMES OF KEY PERSONNEL AND RELEVANT PROJECTS**



**David Schmidt**  
**Director of Landscape Architecture**

Mr. Schmidt has more than 16 years’ experience in the fields of land development planning, landscape architecture, urban design, and project management and is the Director of Landscape Architecture at Alliant. His primary responsibilities include project management, regulatory approvals, site layout and design, construction documentation, regional and community planning, and graphic design.

**YEARS EXPERIENCE**

16 years overall, and 2 years with Alliant.

**EDUCATION**

- ◆ BS, Landscape Architecture, University of Arkansas, Minor in Horticulture
- ◆ Currently pursuing licensure as a Landscape Architect in Florida, 2025

**SWEETGRASS ♦ CITY OF ST. MARY’S, GA**

Served as project manager and designer responsible for the neighborhood entry, common area, pocket parks, beer garden, dog walk, and amenities at the clubhouse. Sweetgrass is a 150-acre community that will feature 312 multifamily units, 194 townhomes, 143 single family homes, and 212,600 SF of commercial space. The Sweetgrass community will be home to almost 650 families in a walkable, mixed-use neighborhood that provides not only housing, but places for working, shopping, recreation, and civic engagement.

**REVERIE AT TRAILMARK ♦ CITY OF ST. AUGUSTINE, FLORIDA**

David served as the project manager and designer responsible for the neighborhood entry, common area, pocket parks, beer garden, dog park, and amenities at the clubhouse. Reverie is a 55+ community located in St. Augustine, FL permitted as a Community Development District that consists of 487 single family homes and a 4,600 SF clubhouse.

**BRADENTON RIVERWALK ♦ CITY OF BRADENTON, FLORIDA**

David and his team were responsible for multiple project components, such as data collection, landscape design, renderings, and 3D modeling for the master plan. Kimley-Horn completed the master planning process for the 1.5-mile-long riverfront area in Bradenton known as the Riverwalk. Services included grant funding analysis, master planning, public involvement, design development, and stakeholder coordination. Unanimous approval was given from the Bradenton City Council with the preparation of construction documents and permitting drawings.

**TOM BENNETT PARK ♦ MANATEE COUNTY, FLORIDA**

Provided master plan design and renderings for the public meeting process. Substantial environmental restoration of the waterfront was key to the project’s success. Key design elements included a civic open space, amphitheater, several miles of trails and waterfront promenades, active recreation fields, a community building, and interpretive signage highlighting the significant environmental restoration of that project.

**EMERALD TRAIL ♦ CITY OF JACKSONVILLE, FLORIDA**

Served as senior project manager for segment #1 construction and segment #2 design of a multi-modal trail system in the urban core. This expansive trail network, spanning about 30 miles, connects 14 historic neighborhoods to downtown, creeks, the St. Johns River, 16 schools, two colleges, and 21 parks, with numerous other amenities and businesses. An additional 13 schools and 17 parks are nearby.

**US 41 LANDSCAPING ENHANCEMENTS AND GATEWAY FEATURES ♦ CITY OF NORTH PORT, FLORIDA**

Provided landscape architectural services and enhancements for US 41 spanning nearly three miles of highway through the City of North Port. The project provides a harmonious streetscape that utilizes rhythm and repetition of landscape along with lighting elements to create a sense of place within the area.

**GORDON RIVER GREENWAY PARK ♦ COLLIER COUNTY, FLORIDA**

Provided landscape architectural services and enhancements for US 41 spanning nearly three miles of highway through the City of North Port. The project provides a harmonious streetscape that utilizes rhythm and repetition of landscape along with lighting elements to create a sense of place within the area.

**RESUMES OF KEY PERSONNEL AND RELEVANT PROJECTS**



**Clayton Walley, L.S., PSM**  
**VP Florida Land Survey**

Mr. Walley has over 25 years of land surveying experience. Clayton has provided survey services in numerous states, his expertise includes largescale boundary and topographic surveys, construction staking, and as-built surveys. Clayton is skilled in project management, GPS mission planning and execution, low altitude UAV data acquisition, and CAD. He is well-versed in all aspects of surveying and project management.

**YEARS EXPERIENCE**

25 years overall, and 6 years with Alliant.

**EDUCATION**

- ◆ A.A.S. Industrial Engineering Technology, Paul D. Camp Community College
- ◆ BS Business, Project Management, University of Phoenix

**PROFESSIONAL REGISTRATIONS**

Licensed Surveyor in Florida (LS7209)

**STADIUM OF THE FUTURE – AREA C ♦ CITY OF JACKSONVILLE, FLORIDA**

Alliant provided professional surveying services to support the construction of concrete structures for the Stadium of the Future project in Jacksonville, FL. Services included project management and startup data preparation, layout of all concrete structures, and comprehensive site calculations to support construction accuracy. Alliant’s work began two weeks after receipt of approved plans and CAD files, with scheduling coordinated closely with the client to optimize field crew efficiency and reduce idle time. The project was delivered with a high-quality layout and reliable as-built documentation for agency approval.

**RIVER CITY SCIENCE ACADEMY ♦ CITY OF JACKSONVILLE, FLORIDA**

Alliant delivered a full suite of construction layout and as-built surveying services for the River City Science Academy project. Scope included horizontal and vertical control, staking of utilities and site features such as silt fences, stormwater structures, parking lots, and curb and gutter, as well as as-built data collection and final CAD drafting for submittal. Alliant’s internal quality control process, advanced filed technology, and pre-calculated data workflows allowed for accurate, efficient fieldwork and reduced costs to the client. Optional services such as building pad layout and storm-tech system staking were also available.

**RIVER GLEN SUBDIVISION ♦ NASSAU COUNTY, FLORIDA**

Oversight of platting for four (4) new phases of an existing subdivision.

**TOPOGRAPHIC SURVEY OF BLACK BRANCH CREEK & HYMON CIRCLE ♦ CITY OF BUNNELL, FLORIDA**

Utilizing UAV technology as well as conventional methods to collect data and provide a survey for design. This project focused on drainage to improve localized flooding.

**SR 100 MOODY BOULEVARD ROUTE SURVEY / TOPOGRAPHIC SURVEY ♦ CITY OF BUNNELL, FLORIDA**

Oversight of 5,000 LF ± route survey for utility design.

**PECAN PARK ROAD ♦ CITY OF JACKSONVILLE, FLORIDA**

Survey Manager on this project that will add extra traffic lanes and add new infrastructure while raising the overall elevation of the roadway. Responsible for QC field work including construction stake out, as-built collection, coordinating settlement monitoring, monitoring of bridge structure, and overall project fluidity. Held regular field meetings with CEI to discuss settlement plate monitoring results.

**A1A / MAY STREET ♦ CITY OF ST. AUGUSTINE, FLORIDA**

Survey Manager on this project that rebuilt the intersection with new infrastructure. Responsible for coordinating crews and scheduling. QC field work including construction stake out, as-built data collection, and monitoring structures for movement and settling. Regularly met with CEI on settlement monitoring results to ensure procedure and protocol.

**RESUMES OF KEY PERSONNEL AND RELEVANT PROJECTS**



**Joe Brinson, PWS**  
**Environmental Senior Project Manager**

**TOWN CENTER BOULEVARD PROPERTY ♦ CITY OF PALM COAST, FLORIDA**

Project Manager, ECS completed an ecological study with the purpose to evaluate the site for the occurrence and/or potential occurrence of jurisdictional wetlands and/or protected wildlife species and their habitats.

**DIX ELLIS TRAIL ♦ CITY OF JACKSONVILLE, FLORIDA**

Project Manager, ECS completed a preliminary wetlands delineation study to evaluate jurisdictional wetlands and/or protected wildlife species and their habitats.

**BEAUTYREST AVENUE PROPERTY ♦ CITY OF JACKSONVILLE, FLORIDA**

Project Manager, ECS completed an Ecological Due Diligence with Cultural Resource Assessment Report (CRAS). The purpose of the field visit was to evaluate the site for the occurrence and/or potential occurrence of jurisdictional wetlands and/or protected wildlife species and their habitats.

**FIRST COAST EXPRESSWAY ♦ MIDDLEBURG, CLAY COUNTY, FLORIDA**

Project Manager, ECS completed a preliminary wetlands delineation and preliminary threatened and endangered species survey. The purpose of the field visit was to evaluate the site for the occurrence and/or potential for occurrence of jurisdictional wetlands and/or protected wildlife species and their habitats.

**BAINBRIDGE NOCATEE PARKWAY PROJECT ♦ CITY OF JACKSONVILLE, FLORIDA**

Project Manager, ECS completed a preliminary wetlands delineation and preliminary threatened and endangered species survey. The purpose of the field visit was to evaluate the site for the occurrence and/or potential occurrence of jurisdictional wetlands and/or protected wildlife species and/or habitat on the site and its relevant surroundings.

Mr. Brinson is an Environmental Senior Project Manager for ECS and has more than 26 years' experience in wetland permitting, species, timber assessments, greenbelts, and tree/arborist services. His responsibilities include the daily management of all phases of environmental, including proposal preparation and review, environmental compliance (Spec/NPDES), budgeting daily and ongoing activities, preparation and review of reports, client interaction, invoicing, and marketing.

**YEARS EXPERIENCE**

27 years overall, and 3 years with ECS, Florida, LLC.

**EDUCATION**

- ♦ BS, Forest Resource Management / Forest Biometrics, University of Georgia

**PROFESSIONAL REGISTRATIONS**

Professional Wetland Scientist

**RESUMES OF KEY PERSONNEL AND RELEVANT PROJECTS**

**Brett H. Harbison, PE**
**Director of Transportation & Geotechnical Services and Principal Engineer**
**MONCRIEF PEDESTRIAN BRIDGE REPLACEMENT ♦ CITY OF JACKSONVILLE, FLORIDA**

Senior Engineer responsible for the geotechnical exploration, laboratory testing, and engineering analysis for the pedestrian bridge. The main span and extended ramps will be supported on 54-inch non-redundant drilled shafts. The existing bridge was approximately 70-75 feet long, the replacement bridge will be about the same.

**FDOT DISTRICT 2, I-95 NASSAU RIVER BRIDGE IMPROVEMENTS ♦ DUVAL / NASSAU COUNTY LINE, FLORIDA**

Foundation/Geotechnical Engineer of Record/Project Manager responsible for field coordination, laboratory shear strength testing, rock core strength testing, and geotechnical analysis to support design and construction of non-redundant drilled shafts to support crutch bents proposed for the existing I-95 north and southbound bridges. Brett directed field crews and staff in performing 24 Standard Penetration Tests (SPT) borings in tidally inundated project area using amphibious and sound barge platforms. Borings were advanced to depths of 125 feet below the river mudline. Static axial shaft capacities were estimated to determine anticipated shaft tip elevations. Engineering reports were prepared including drilled shaft analysis, soil parameter recommendations for lateral analysis, and shaft installation construction recommendations.

**CITY OF JACKSONVILLE (COJ) NORTHBANK BULKHEAD REPLACEMENT ♦ CITY OF JACKSONVILLE, FLORIDA**

Geotechnical Engineer responsible for coordinating the geotechnical exploration to replace the existing bulkhead along the northern bank of the St. Johns River in downtown Jacksonville extending between the Fuller Warren Bridge and Liberty Street. The project included constructing a new bulkhead wall in front of the existing bulkhead and installing anchors thru the existing bulkhead. Scope of Work included land and waterside SPT borings, rock coring, laboratory testing, and engineering analysis for the design and construction of the new bulkhead and anchors.

**CITY OF JACKSONVILLE (COJ) SIDEWALKS AND PEDESTRIAN IMPROVEMENTS ♦ CITY OF JACKSONVILLE, FLORIDA**

Geotechnical Project Manager, services for projects under this contract consist of geotechnical exploration and engineering analysis for tasks such as new sidewalks, drainage improvements, culvert extensions and replacement, and retaining walls. The geotechnical exploration included mobilizing our truck-mounted drill rig to city roads and highways. Following subsurface exploration, laboratory testing, and geotechnical engineering analysis, we provided geotechnical recommendations and site preparation recommendations. These recommendations included clearing and stripping, temporary groundwater control, soil parameters for culver design, excavation protection, and structural backfill for compaction of structural backfill.

**LONNIE MILLER SR. REGIONAL PARK STRUCTURES & PEDESTRIAN TRAIL ♦ CITY OF JACKSONVILLE, FLORIDA**

Geotechnical Engineer for park improvements proposed to include multiple new courts, multi-use fields, playgrounds, pavilions, new parking areas, elevated boardwalks, restroom, and concession facilities, 2-story concrete scorer's building and 2,700 LF of asphalt surfaced pedestrian trail. Geotechnical explorations were performed. Reporting was presented with design recommendations for shallow foundations, groundwater control and underdrain recommendations for field areas along with construction of asphalt pavement base and structural courses for the trail system. Site preparation and earthwork recommendations included clearing and stripping, removal and replacement of deleterious soils/debris encountered, temporary groundwater control, and placement/compaction of fill and backfill soils.

Brett has more than 18 years of field, laboratory, and geotechnical analysis experience throughout Florida. He manages the entire geotechnical process which includes drilling, laboratory testing, and analysis for numerous Florida Department of Transportation (FDOT) projects. Brett is experienced in both Design-Bid-Build and Design-Build FDOT project delivery methods. As a Certified Smartpile EDC system user, he has provided dynamic load testing services on numerous pre-stressed, pre-cast concrete driven piles on bridge foundation project throughout Florida.

**YEARS EXPERIENCE**

16 years overall, and 5 years with Meskel & Associates Engineering, PLLC

**EDUCATION**

- ♦ BS, Civil Engineering, Florida State University, (FSU)
- ♦ Graduate Courses, University of Central Florida

**PROFESSIONAL REGISTRATIONS**

Professional Engineer in Florida (74679)

Professional Engineer in Georgia (PE37919)

**REPRESENTATIVE PROJECTS-1**

**Shadow Crest at Rolling Hills Community Development District**  
Phases 3B and 3C, Green Cove Springs, Florida



**Project Owner’s Information**

**Project Owner**

Rolling Hills Community Development District

**Point of Contact**

Marilee Giles

**Contact No.**

(904) 940-5850 x 412

Community Development District (CDD) constructed by bond issuance infrastructure to support a 247-lot single-family platted phase of the community. Mr. Schofield is the acting District Engineer for this part of the project and is also the Engineer of Record.

This project required coordination with the primary CDD engineer to coordinate ongoing construction of a prior phase of the project Shadow Crest, being adjacent to Rolling Hills. Construction ran concurrently so both Engineer’s attended each monthly board meeting to give updates on each respective project. The prior phase included construction of a lift station to receive effluent from both projects.

Mr. Schofield assisted the CDD to secure electrical and landscape maintenance easements. He also reviewed all contractor, vendor, and supplier invoice and pay requests to ensure proper use of the bond funds. Scope included cost estimating and writing the Engineer’s Report for the Shadow Crest phase of the district full planned build-out.

**REPRESENTATIVE PROJECTS-2**

**Reverie at Palm Cost Subdivision**  
Palm Coast, Florida



**Project Owner's Information**

**Project Owner**

Sunbelt Land Management

**Point of Contact**

Ken Belshe

**Contact No.**

(386) 986-2411

Alliant is the Engineer of Record for complete design and permitting of 421 home Community Development District residential subdivision. Provided all aspects of oversight and design. Provided Certified Engineer's Report including cost estimating for the CDD.

**REPRESENTATIVE PROJECTS-3**

**Westside Sewer Improvements, Phase 1**  
City of Bunnell, Florida



**Project Owner’s Information**

**Project Owner**  
City of Bunnell

**Point of Contact**  
Dustin Vost, Infrastructure Director

**Contact No.**  
(386) 437-7515

Alliant prepared and submitted a St. Johns River Water Management District (SJRWMD) REDI Grant Application on behalf of the city. The application was ranked #1 by the SJRWMD. The project consisted of sanitary sewer CIPP lining, lift station upgrades, and regional storm sewer and swale improvements to address ongoing flooding issues in the Dean Road neighborhood.

**REPRESENTATIVE PROJECTS-4**

**City of Bunnell Slip Lining Rehabilitation**  
City of Bunnell, Florida

Alliant completed and submitted a SJRWMD REDI Grant Application on behalf of the City of Bunnell, FL. The project was funded by the SJRWMD and City funds, Alliant performed a 1.1-mile route survey along SR 100 (Moody Blvd.) in the City from Grand Reserve Parkway to North Palmetto Street. This required deed research for all adjacent properties along the route including FDOT right-of-way. Alliant also designed and prepared bid documents for a reclaimed water main.



**Project Owner’s Information**

**Project Owner**  
City of Bunnell

**Point of Contact**  
Dustin Vost, Infrastructure Director

**Contact No.**  
(386) 437-7515

**Firms Involved with This Project**

**Firm Name**  
Alliant Engineering, Inc.  
Alliant Florida, Inc.

**Firm Location**  
Jacksonville, Florida  
Jacksonville, Florida

**Role**  
Project Engineer  
Land Surveyor

**REPRESENTATIVE PROJECTS-5**
**Sweetgrass Apartments, Phase 1, Enhanced Landscape**  
 St. Mary's, Georgia

**Project Owner's Information**
**Project Owner**

Sweetgrass Acquisition, LLC

**Point of Contact**

Ron Buckley

**Contact No.**

(904) 247-5334

Sweetgrass is a 150-acre master planned development located in St. Mary's GA for Tierra Linda Development, LLC. Sweetgrass is comprised of 312 class A multi-family units, 194 townhomes, 143 single family homes and 212,600 SF of commercial space. Working in collaboration with the client, architect, and interior designer, the Sweetgrass project will be home to approximately 650 families in walkable, mixed-use neighborhoods that provide not only housing but places for working, shopping, recreation, and civic engagement. The team's services included project management for the enhanced landscape design, irrigation, neighborhood clubhouse, and amenity area which included the clubhouse pool deck, shade structures, outdoor kitchen, landscape architecture, hardscape, site electrical engineering (managed sub), mail kiosk, design of the neighborhood entry monument, security gate, dog park and all site civil

**Firms Involved with This Project**
**Firm Name**

Alliant Engineering, Inc.

Alliant Florida, Inc.

**Firm Location**

Jacksonville, Florida

Jacksonville, Florida

**Role**

Project Engineer

Land Surveyor

**REPRESENTATIVE PROJECTS-6**

**Trout Creek Community Development District**  
St. Johns County, Florida



**Project Owner’s Information**

<b>Project Owner</b>	<b>Point of Contact</b>	<b>Contact No.</b>
Trout Creek Community Development District	Melissa Dobbins	(904) 436-6240

ECS Florida, LLC completed an Arboriculture Assessment for the landscape and tree decline predominantly live oaks with a few magnolias. ECS understood the trees started to decline approximately two years after they were planted. The scope of work included assessing the current condition of landscaping trees along Shearwater Parkway to determine whether conditions required removal and recommend an appropriate course of action for remediation. Investigative methods used were visual inspection of roots and tree, soil pH and nutrient analysis, root excavation, general leaf density analysis, irrigation water pH testing and bulk density testing of the soil.

**Firms Involved with This Project**

<b>Firm Name</b>	<b>Firm Location</b>	<b>Role</b>
ECS Florida, LLC	Jacksonville, Florida	Environmental

**REPRESENTATIVE PROJECTS-7**

**Tapestry Westland Village**  
Jacksonville, Florida



**Project Owner's Information**

<b>Project Owner</b>	<b>Point of Contact</b>	<b>Contact No.</b>
Arlington Properties	Trey Barnes	(205) 397-6834

This property is a 28-acre luxe apartment community located in Jacksonville, FL at the intersection of Collins Road and Plantation Bay Drive. This project included performing a geotechnical exploration, laboratory testing program, and engineering analysis to assist the design team with the design of twelve 3-story residential buildings, a single-story clubhouse, lift station, pool, and dog park. Our analysis included providing recommendations for the construction of shallow foundations and a wet well structure.

Borings: 16 SPT, 16 Hand Augers

Total Feet: 533 LF (9 SPT to 30 feet, 4 SPT to 20 feet, 1 SPT to 25 feet, 5' sampling intervals) (16, 6-foot hand augers, 1 foot sampling intervals).

Samples: 223

**Firms Involved with This Project**

<b>Firm Name</b>	<b>Firm Location</b>	<b>Role</b>
ECS Florida, LLC	Jacksonville, Florida	Environmental

**KEY PERSONNEL PARTICIPATION ON PROJECT**

Names of Key Personnel	Role in This Contract	Involvement in Example Projects						
		1	2	3	4	5	6	7
Jeff Sprouse, PE	Project Manager	X		X	X		X	
Andrew Mansen, PE	Assistant Project Manager	X		X	X		X	
Joseph Schofield, PE	Senior Civil Engineer	X		X	X			
Adam Oestman, PE	Production Manager		X					
David Schmidt	Director of Landscape Architecture					X		
Joe Brinson, PWS	Professional Wetland Scientist						X	
Brett Harbison, PE	Director of Transportation & Geotechnical Services							X

**Example Project Key**

Number	Title of Project	Number	Title of Project
1	Shadow Crest at Rolling Hills CDD (Ph. 3B & C)	6	Trout Creek Community Development District
2	Spring Lake Subdivision	7	Tapestry Westland Village
3	Bunnell Westside Sewer Improvements	8	
4	Bunnell Slip Lining Rehabilitation	9	
5	Sweetgrass Apartments, Ph. I Enhanced LS	10	

**ADDITIONAL INFORMATION**

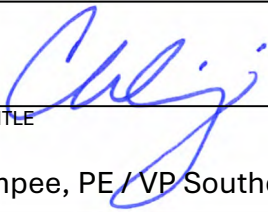
**FIRM LICENSURE AND PREQUALIFICATIONS**

Alliant is licensed to perform professional engineering in the state of Florida and is certified with the Florida Department of State as an S-Corporation. A copy of the firm’s licenses and key staff licenses can be found in Appendix A.

No judicial or administrative agency or qualification board has ever investigated Alliant or any of its employees. Neither Alliant nor any Alliant employee, including its engineers has ever received prior adverse decision or settlement relating to a violation of ethical standards.

**OTHER TECHNICAL SKILLS REFERENCE**

- ▶ 6.1 – Traffic Engineering Studies
- ▶ 6.2 – Traffic Signal Timing
- ▶ 6.3.1 – Intelligent Transportation Systems Analysis and Design
- ▶ 6.3.2 – Intelligent Transportation Systems Implementation
- ▶ 6.3.3 – Intelligent Transportation Traffic Engineering Systems Communications
- ▶ 7.3 – Signalization
- ▶ 8.1 – Control Survey
- ▶ 8.2 – Design, Right-of-Way, and Construction Surveying
- ▶ 8.4 – Right-of-Way Mapping

<b>AUTHORIZED REPRESENTATIVE</b>	
SIGNATURE	DATE
 Curt Wimpee, PE / VP Southeast Region	May 12, 2025
NAME AND TITLE	

**ADDITIONAL INFORMATION**

To full address the criteria requested in the RFQ, we offer the following additional information. This further demonstrates Alliant Engineering’s expertise and capabilities to perform all work that is anticipated under contract as the District Engineer.

**ABILITY AND ADEQUACY OF PROFESSIONAL PERSONNEL**

Alliant Engineering, Inc. (Alliant) offers professional design and project management services in municipal infrastructure, land development, transportation, traffic engineering, design-build, structural, landscape architecture, and surveying. Alliant’s backbone is a professionally diverse group of talented professionals dedicated to providing quality design, management, and construction services. Established in 1995, Alliant has provided 29 years of professional engineering services to a broad range of public and private clients. Our collaborative team approach and integrated management style allows us to efficiently complete projects while providing a high level of quality. We bring value to our clients by combining unmatched civil engineering, expertise, and innovation.

In addition to being highly qualified for this work, we have intricate knowledge of the infrastructure challenges within smaller communities. Our key staff for this project team are experts in their disciplines and well suited to provide the continuing engineering services required of your District Engineer.

At the program level, we have the following critical roles:

- ▶ **Project** – Responsible for building project teams tailored to meet project goals, provide ongoing project oversight, and be the primary point of contact for the district. Jeff Sprouse, PE was selected to be Project Manager because in addition to having 28 years in the industry, he understands how to make CDD projects successful. As Project Manager, Jeff will be handling the district meetings and managing the construction/engineering services.
- ▶ Jeff will also ensure all team members are trained in the Alliant Quality Management Process and verifying that quality processes are followed on individual projects.
- ▶ **Assistant Project Manager** – Responsible for identifying team members for individual work orders and ensuring uniformity in format and standards between projects. This individual is also an expert technical resource for project teams.

*Our team is organized to execute work orders quickly and ensure quality and timely delivery.*


**Project Manager**
**Jeff Sprouse, PE**

**Assistant Project Manager**
**Andrew Mansen, PE**

**ADDITIONAL INFORMATION**

**CERTIFIED MBE**

Alliant’s teaming partner **Meskel & Associates Engineering (MAE)** is a certified Women owned DBE and JSEB based in Jacksonville, FL with additional office in Lake City and Tampa. They specialize in geotechnical engineering, drilling, and laboratory testing services. MAE’s certifications are included at the end of this form.

**WILLINGNESS AND ABILITY TO MEET TIME AND BUDGET REQUIREMENTS**

*At Alliant, we take pride in delivering complex projects on difficult timelines. This can only be accomplished through great project management and a sound project approach. Open, honest, and timely communication with the District, stakeholders, and potential subconsultants is the key to project success.*

We will facilitate all formal reviews in an organized and timely manner to keep the project moving forward. We will also conduct progress meetings to efficiently provide updates and to discuss design issues that are crucial to the schedule for both the district and the project team. Our Quality Management Plan (QMP) will be revised to be specific to each project and will be followed throughout the design.

For a project to be efficient, not only does the engineering and project management need to be effective, understanding the permitting agencies and maintaining those key relationships is a necessity. Alliant has performed a multitude of projects and has both the expertise of dealing with the appropriate permitting agencies as well as maintaining those relationships needed to be efficient with complex projects. Alliant has developed relationships over the years with subconsultants as well as contractors. We have the expertise and knowledge to develop designs to help minimize cost to our clients during construction. This can be done because of our knowledge of building systems and construction techniques. Anticipation of construction techniques and communication with contractors during design are key elements to an effective cost savings project approach.

**COMMUNICATION WITH THE DISTRICT**

Fast-tracked projects require intense and continuous communication and collaboration with the district and their oversight team. Alliant will establish a draft meeting schedule for discussion at the kickoff meetings. We envision three levels of meetings: Design Review, Over-the-Shoulder Review and Progress Meetings.



**DESIGN REVIEW**

Alliant’s teaming partner Meskel & Associates Engineering (MAE) is a certified Women owned DBE and JSEB based in Jacksonville, FL with additional office in Lake City and Tampa. They specialize in geotechnical engineering, drilling, and laboratory testing services. MAE’s certifications are included at the end of this form.

**OTSR**

OTSRs will be scheduled in between the major milestones. These informal design reviews will allow the district to be kept abreast of and have input into the design as it is progressing. The intent of these meetings is to present “in-progress” plans to the district to discuss specific issues where decisions are required that may impact schedule. OTSRs may also include key stakeholders as appropriate. It is envisioned that most OTSR meetings would be face-to-face.

**PROGRESS MEETINGS**

We will use frequent progress meetings to keep the district’s team fully informed and involved in all aspects of the project. These meetings serve as a forum to address issues, hot topics, and identify action items that need to take place. The meetings can also serve as mini “over-the-shoulder” design review for portions of the project to get instant feedback from the district regarding any issues. We consider these meetings to provide collaboration on the fly” and use them to present all key components of the design prior to the actual submittal. This approach ensures that the district is part of the decision making, reducing the risk of surprises and potential rework.

Most meetings will include an agenda, meeting minutes, and action item log. The minutes and action item log can be shared internally with Alliant’s team, and with the district staff to inform people not at the meeting of decisions and action items that were identified.

In addition to regularly schedule meetings, we will establish the systems and protocols for easy sharing of electronic files to assist with design collaboration and review.



**ADDITIONAL INFORMATION**

**RECENT, CURRENT, AND PROJECTED WORKLOADS**

Alliant is dedicated to client satisfaction which means we must honor schedule commitments. To that end, we regularly assess our workload and plan for growth by keeping our staff level above our immediate needs. This enables us to keep quality and responsiveness at the highest level. **Jeff Sprouse, PE** can allocate the support staff and resources to easily meet any schedule. A project schedule will be developed at the onset of each opportunity received from the district. That schedule will be developed by working in concert with the major stakeholders. The appropriate Alliant team members will then be assigned responsibilities and deadlines to produce deliverables. We will work with district staff for a full understanding of the scope and expectations so we can provide a service that exceeds expectations.

Alliant project managers meet each week to discuss current workload and staffing needs. We maintain a high-level project design schedule that tracks the expected level of project commitments per month compared to the available staffing. At our project manager meetings, we discuss project specific needs and upcoming deadlines to determine if the current staffing is appropriate or if changes will be required to ensure that schedules are met.

**Exhibit 2** below illustrates the estimated time allotment that each of the key members can contribute now. These percentages will fluctuate from week to week based on external influences, but resources will be concentrated when needed to complete specific tasks or address project needs as critical items dictate.

**CONSULTANT'S PAST EXPERIENCE AND PERFORMANCE**

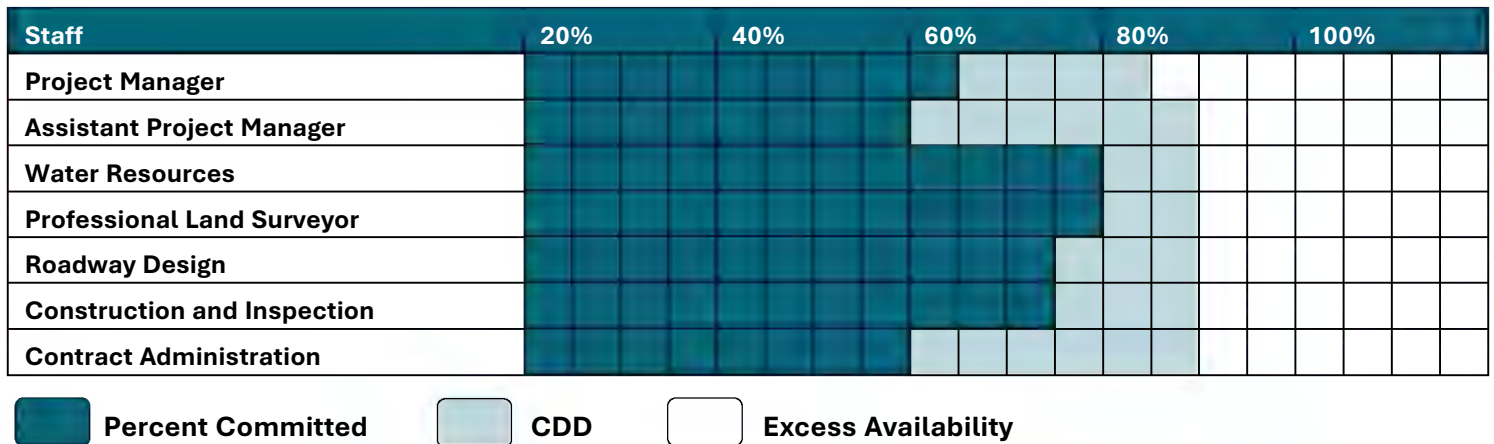
The Alliant team has the experience and expertise required to provide high quality professional services to the district. We would be honored and excited to work with you on future projects as we have with several municipalities in the past including the following:

**Alliant has been serving the southeast region from our Jacksonville, Florida office since 2015.** During that time, we have partnered with cities throughout Florida to address civil engineering needs through on-going contracts. Curt Wimpée, PE is Alliant's Southeast Regional Manager with over 26 years of experience.

**In 2017, Alliant was selected to provide city wide civil engineering services for the City of Bunnell, FL.** From the onset of services, Alliant has worked with the city to obtain over 2.5 million dollars in grant funding to develop their reclaim watermain infrastructure, alleviate stormwater flooding in low lying areas and cast in place (CIPP) lining of their gravity sewer infrastructure. Alliant has worked diligently to provide excellent service to the City's staff during the design and construction administration of these projects. These efforts have earned trust and confidence leading to the City's election as their City Engineer and City Surveyor respectively. We continue to consult with the city on a daily / weekly basis to support their ongoing engineering and surveying needs.

**That same year, Alliant was selected to provide Professional Engineering Services to St. Johns County, FL.** Alliant is currently working with staff to target their specific project needs.

**Exhibit 2 – Projected Schedule**



**ADDITIONAL INFORMATION**

In 2018, Alliant was selected to provide city wide engineering services for the City of Flagler Beach, FL. Alliant assisted the City of Flagler Beach in receiving 1million dollars of grant funding to provide CIPP lining for over seven miles of their gravity sewer infrastructure. Alliant continues to provide these services and will show through this proposal that we work hard to exceed expectations in everything we do.

In 2020, Alliant was selected to provide professional engineering services to the City of Atlantic Beach, FL. Alliant worked with the Public Works Director to evaluate their existing maintenance building and provided recommendations and associated costs to the City Commission for either repair or replacement.

In 2023, Alliant was selected to provide general engineering services to the Tison’s Landing Community Development District.

In 2024, Alliant was selected for the Ridgewood Trails, Oakleaf Town Center, Bartram Park, and the Trails Community Development Districts.

In 2025, Alliant was selected for the CrossCreek Community Development District. Alliant is thrilled to facilitate expansion of our clients into the Community Development Districts.

**VOLUME OF WOR PREVIOUSLY AWARDED TO CONSULTANT BY THE DISTRICT:**

Alliant Engineering, Inc. has not previously performed work for the district.

**TECHNICAL EXPERIENCE – IN ADDITION TO THE REQUESTED SERVICES IN THE RFQ, ALLIANT ALSO PROVIDE THE FOLLOWING SERVICES:**

**Land Planning:**

Land planning begins with our ability to understand the big picture. Our goal is to be respectful stewards of our environment, achieve the highest and best use of the land and position it for the best return on investment. Developing a client’s vision for the spatial use of a site is a passion for us. We understand that planning determines the return on eventstment through efficient allocation of programming, presentation of features, and quality circulaiton. We bring experience and knowledge of navigating land use codes, writing land development guidelines and creating sustaining thriving communities.

**Our Land Planning Services Include:**

- ▶ Site Feasibility Studies
- ▶ Field Investigation & Due Diligence
- ▶ Highest & Best Use Master Planning
- ▶ Park Planning
- ▶ Urban Planning
- ▶ Mixed-Use Town Centers
- ▶ Waterfront Projects

**Landscape Architecture:**

A particular fusion happens during landscape design. In every detail from the sense of arrival to each major gathering space and every transition in between, our passion for creating unique and engaging outdoor environments brings personality to every project.

**Our Landscape Architecture Services Include:**

- ▶ Tree Preservation & Mitigation Plan Preparation
- ▶ Landscape Code Minimum Plans
- ▶ Community Garden Design
- ▶ Hardscape Design
- ▶ Swimming Pool & Water Park Design
- ▶ Night Lighting Design
- ▶ Neighborhood Amenities
- ▶ Entry Monuments
- ▶ Parks
- ▶ Neighborhood Trails
- ▶ Streetscape Design
- ▶ Water Feature Design
- ▶ Planting
- ▶ Irrigation Design

**Land Surveying:**

Alliant is committed to providing accurate information expediently, whether it is a next-day service construction staking or producing a final plat though the public approval process. We provide a full range of surveying services for our clients in both the public and private sectors. Surveying is often one of the first requirements of a project and it is usually one of the last services at project completion.

We ensure accurate and agile land survey services for all projects.

**Our Land Surveying Services Include:**

- **Boundary Surveys**
  - ALTA/NSPS Land Title Surveys
  - Certificate of Survey
- **Topographic Surveys**
  - Design Locations/Existing Conditions Survey
  - Hydrographic Survey
  - Underground Survey (Utilities, Areaways)
- **Record Surveys**
  - Subdivision (Plat, RLS, CIC, Right-of-Way Plat)
  - Memorial Plat
- **Construction Surveys**
  - Establish Horizontal and Vertical Site Control
  - Staking horizontal and Vertical Site Control
  - Volume Measurements

**ADDITIONAL INFORMATION**

**CONSTRUCTION ADMINISTRATION:**



Alliant Engineering offers Construction Administration services to developers and municipalities through the construction phase of projects we design. During this phase our team will coordinate with contractors and consultants to monitor and review the progress of construction.

**Construction Administration Services**

- ▶ Consultant Coordination and Project Management
- ▶ Client Representation
- ▶ Submittal Package Review
- ▶ Construction Phase Permitting
- ▶ Change Order Review and Approval

**Graphic Design**

Representing the identity of a project is essential to many aspects, from marking collateral to identity monument signs and wayfinding directional signage. Our graphics department excels in color artistry, marketing presentations, and community sign design with the intent to ensure the best delivery of every message to its audience.

**Graphic Design Services**

- ▶ Project Icons & Logos
- ▶ Neighborhood Identity Signs
- ▶ Exterior Signage
- ▶ Street & Public Signage
- ▶ Wayfinding Signage
- ▶ Promotional & Marketing Products
- ▶ Perspective Renderings

**TRAFFIC:**

Alliant is sought after for delivery of large scale, complex transportation projects. Our team is dedicated to improving safety and mobility for the traveling public whether on foot, bike, bus, or in a motor vehicle. Our experienced and diverse traffic engineering team allows us the ability to provide a wide range of services to public and private sector clients. We have the depth and staff resources to manage a deep workload and provide the best service, responsiveness, and quality product every agency deserves. These contracts span many service areas for clients similar to the CDD.

**Traffic Services**

- ▶ Traffic Design
- ▶ Traffic Sign Interconnect
- ▶ ITS
- ▶ Traffic Modeling
- ▶ Traffic Impact Studies
- ▶ Intersection Corridor Network Operations
- ▶ Traffic Signal Design
- ▶ Transportation and Traffic Studies
- ▶ Traffic Signal Timing and Arterial Analysis
- ▶ Traffic Signals and Foundations
- ▶ Traffic Counting

**References**

**Flagler Beach**

**Dave Taylor**

☎ (386) 986-7158

✉ dtaylor@cityof  
flaglerbeach.com

**City of Palm Coast**

**Stephen Flanagan**

☎ (386) 986-2354

✉ SFlanagan@palmcoastgov.com

**City of Atlantic Beach**

**Scott Williams**

☎ (904) 247-5834

✉ swilliams@coab.us

**City of Bloomington, MN**

**Kirk Roberts**

☎ (952) 563-4914

✉ roberts@bloomingtonmn.gov

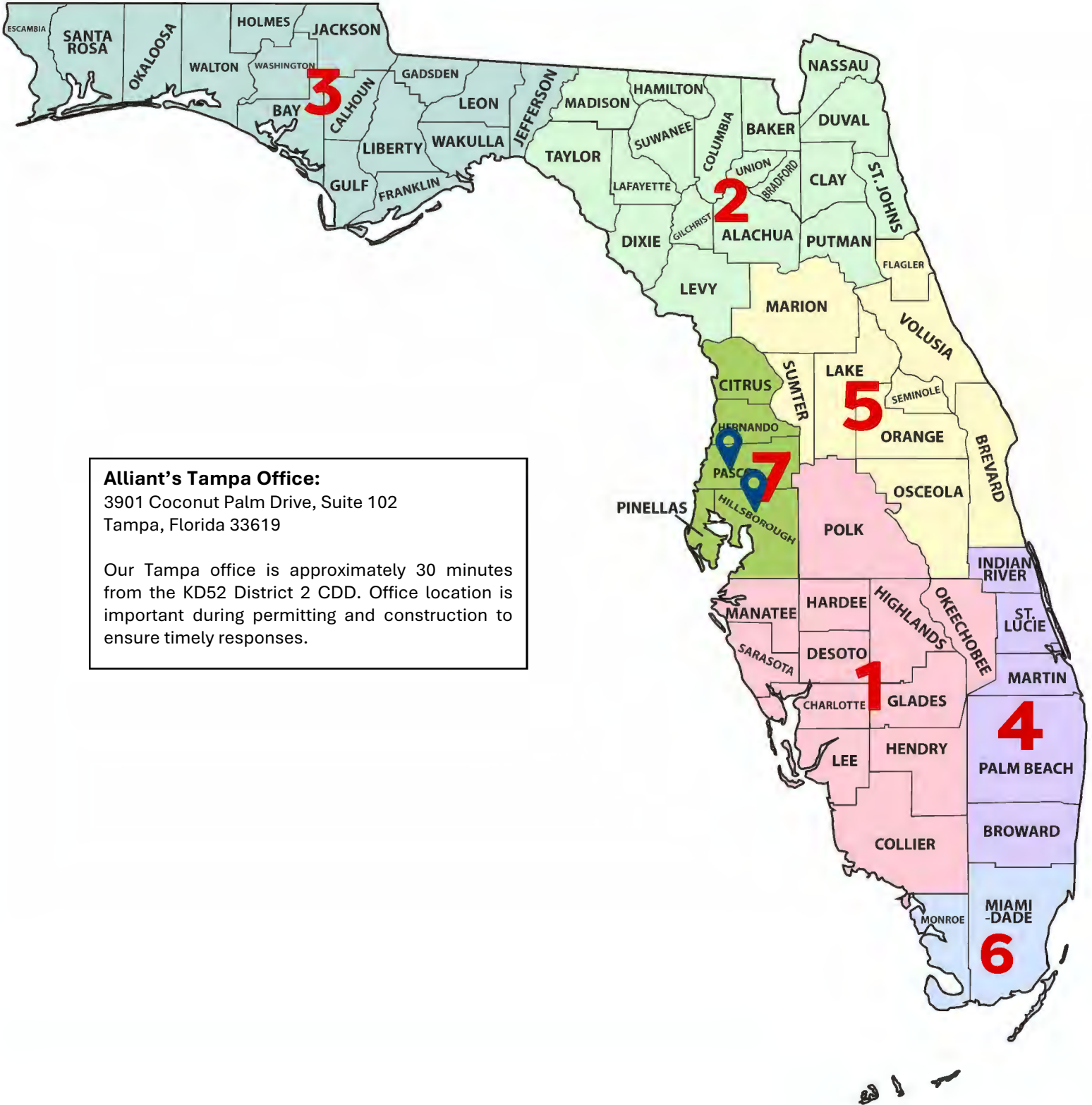
**ADDITIONAL INFORMATION**
**FIRM LICENSURE AND PREQUALIFICATIONS:**

Alliant is licensed to perform professional engineering and landscape architecture in the State of Florida and is certified with the Florida Department of State as an S-Corporation. A copy of the firm’s licenses and key staff licenses can be found at in Appendix A.

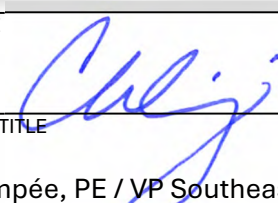
No judicial or administrative agency or qualification board has ever investigated Alliant or any of its employees. Neither Alliant nor any Alliant employee, including its engineers has ever received prior adverse decision or settlement relating to a violation of ethical standards.

OTSR	
6.1	Traffic Engineering Studies
6.2	Traffic Signal Timing
6.3.1	Intelligent Transportation Systems Analysis & Design
6.3.2	Intelligent Transportation Systems Implementation
6.3.3	Intelligent Transportation Traffic Engineering Systems Communications
7.3	Signalization
8.1	Control Surveying
8.2	Design, Right-of-Way, and Construction Surveying
8.3	Right of Way Mapping

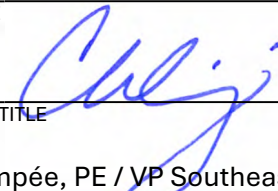
LOCATION MAP




**GENERAL QUALIFICATIONS**

Alliant Engineering, Inc.				YEAR ESTABLISHED 1995		YEAR ESTABLISHED 41-1818046	
3901 Coconut Palm Drive, Suite 102				<b>OWNERSHIP</b>			
Tampa, Florida 33619				TYPE Corporation			
Jeff Sprouse, PE, Project Manager				SMALL BUSINESS STATUS N/A			
(813) 954-4337		jsprouse@alliant-inc.com		NAME OF FIRM Alliant Engineering, Inc.			
<b>EMPLOYEES BY DISCIPLINE</b>				<b>PROFILE OF FIRM'S EXPERIENCE AND ANNUAL AVERAGE REVENUE FOR LAST 5 YEARS</b>			
Function Code	Discipline	Number of Employees		Profile Code	Experience	Revenue Index Number	
		Firm	Branch				
02	Administrative	18	3	E10	Environmental & Natural Resource Map	4	
08	CAD Technician	7	1	H07	Highways	8	
12	Civil Engineer	55	9	H11	Housing	7	
15	Construction Inspection	5	0	104	ITS	4	
16	Construction Manager	1	0	L03	Landscape Architecture	6	
23	Environmental Scientist	2	0	P05	Planning	5	
38	Land Surveyor	13	0	S09	Structural Design	4	
39	Landscape Architect	6	2	S10	Surveying	7	
47	Planner	2	0	T03	Traffic & Transportation Engineering	7	
57	Structural Engineer	2	0				
60	Transportation Engineer	61	1				
62	Water Resources Engineer	3	0				
<b>TOTAL:</b>		<b>175</b>	<b>16</b>				
<b>ANNUAL AVERAGE PROFESSIONAL SERVICES REVENUES OF FIRM FOR LAST 3 YEARS (Insert revenue index number as shown at right)</b>				<b>PROFESSIONAL SERVICES REVENUE INDEX NUMBER</b>			
a. Federal Work	1	1. Less than \$100,000		6. \$2 million to less than \$5 million			
b. Non-Federal Work	9	2. \$100,000 to less than \$250,000		7. \$5 million to less than \$10 million			
<b>c. Total Work</b>	<b>9</b>	3. \$250,000 to less than \$500,000		8. \$10 million to less than \$25 million			
		4. \$500,000 to less than \$1 million		9. \$25 million to less than \$50 million			
		5. \$1 million to less than \$2 million		10. \$50 million or greater			
<b>AUTHORIZED REPRESENTATIVE</b>							
SIGNATURE 						DATE May 12, 2025	
NAME AND TITLE Curt Wimpée, PE / VP Southeast Region							

**GENERAL QUALIFICATIONS**

Alliant Florida, Inc.				YEAR ESTABLISHED 2019		YEAR ESTABLISHED 83-2802440	
3901 Coconut Palm Drive, Suite 102				<b>OWNERSHIP</b>			
Tampa, Florida 33619				TYPE			
Clayton Walley, Vice President Florida Land Survey				SMALL BUSINESS STATUS N/A			
(904) 900-3507		cwalley@alliant-inc.com		NAME OF FIRM			
<b>EMPLOYEES BY DISCIPLINE</b>				<b>PROFILE OF FIRM'S EXPERIENCE AND ANNUAL AVERAGE REVENUE FOR LAST 5 YEARS</b>			
Function Code	Discipline	Number of Employees		Profile Code	Experience	Revenue Index Number	
		Firm	Branch				
08	CAD Technician	5	S10	S10	Surveying	6	
38	Land Surveyor	21					
<b>TOTAL:</b>		<b>26</b>					
<b>ANNUAL AVERAGE PROFESSIONAL SERVICES REVENUES OF FIRM FOR LAST 3 YEARS</b> (Insert revenue index number as shown at right)				<b>PROFESSIONAL SERVICES REVENUE INDEX NUMBER</b>			
a. Federal Work	1	1. Less than \$100,000		6. \$2 million to less than \$5 million			
b. Non-Federal Work	6	2. \$100,000 to less than \$250,000		7. \$5 million to less than \$10 million			
<b>c. Total Work</b>	<b>6</b>	3. \$250,000 to less than \$500,000		8. \$10 million to less than \$25 million			
		4. \$500,000 to less than \$1 million		9. \$25 million to less than \$50 million			
		5. \$1 million to less than \$2 million		10. \$50 million or greater			
<b>AUTHORIZED REPRESENTATIVE</b>							
SIGNATURE 						DATE May 12, 2025	
NAME AND TITLE Curt Wimpée, PE / VP Southeast Region							

**GENERAL QUALIFICATIONS**


Meskel & Associates Engineering, PLLC				YEAR ESTABLISHED 2008		YEAR ESTABLISHED DVZYP4E9Q3L8	
2202 N. West Shore Blvd., Suite 200				<b>OWNERSHIP</b>			
Tampa, Florida 33607				TYPE S-Corporation			
Antoinette D. Meskel, PE, President, Principal Engineer				SMALL BUSINESS STATUS WOSB, SB, DBE: NAICS 541330, 541380, 541920			
(904) 519-6990		tina@meskelengineering.com		NAME OF FIRM			
<b>EMPLOYEES BY DISCIPLINE</b>				<b>PROFILE OF FIRM'S EXPERIENCE AND ANNUAL AVERAGE REVENUE FOR LAST 5 YEARS</b>			
Function Code	Discipline	Number of Employees		Profile Code	Experience	Revenue Index Number	
		Firm	Branch				
02	Administrative	6		E02	Education Facilities, Classrooms	0.5	
08	CAD Technician	1		E09	Environmental Impact Studies & Assessments	0.5	
15	Construction Inspector	5		E12	Environmental Remediation	0.5	
27/55	Foundation/Geotechnical Engineer	7		E13	Environmental Testing & Analysis	0.5	
30	Geologist	1		H07	Highways, Streets, Airfield Paving, & Parking Lots	3	
48	Project Engineers	5		O01	Office Buildings & Industrial Parks	0.5	
58	Technician/Analyst	6		P12	Power Generation, Transmission, & Distribution	0.5	
	Engineering Intern	2		R04	Recreation Facilities (Parks, Marinas, Etc.)	1.5	
	Drillers	8		S04	Sewage Collection, Treatment & Disposal	1	
				S05	Soils, Geotechnical Studies, & Foundations	4	
				S07	Solid Wastes, Incineration, Landfill	1	
				T02	Testing & Inspection Services	3	
				W02	Water Resources, Hydrology, Ground Water	1	
				W03	Water Supply, Treatment & Distribution	2	
<b>TOTAL:</b>				<b>41</b>			
ANNUAL AVERAGE PROFESSIONAL SERVICES REVENUES OF FIRM FOR LAST 3 YEARS (Insert revenue index number as shown at right)				<b>PROFESSIONAL SERVICES REVENUE INDEX NUMBER</b>			
a. Federal Work	4	1. Less than \$100,000		6. \$2 million to less than \$5 million			
b. Non-Federal Work	7	2. \$100,000 to less than \$250,000		7. \$5 million to less than \$10 million			
<b>c. Total Work</b>	<b>7</b>	3. \$250,000 to less than \$500,000		8. \$10 million to less than \$25 million			
		4. \$500,000 to less than \$1 million		9. \$25 million to less than \$50 million			
		5. \$1 million to less than \$2 million		10. \$50 million or greater			
<b>AUTHORIZED REPRESENTATIVE</b>							
SIGNATURE 						DATE May 12, 2025	
NAME AND TITLE Antoinette D. Meskel, PE, President, Principal Engineer							

**GENERAL QUALIFICATIONS**

ECS Florida, LLC	YEAR ESTABLISHED 2017	YEAR ESTABLISHED MNVJKQ85HFG3
4524 N. 56th Street	<b>OWNERSHIP</b>	
Tampa, Florida 33610	TYPE <b>Limited Liability Company</b>	
Rey Ruiz, PE, SI – Branch Manager	SMALL BUSINESS STATUS N/A	
(904) 519-6990	tina@meskelengineering.com	NAME OF FIRM ECS Florida, LLC
<b>EMPLOYEES BY DISCIPLINE</b>		<b>PROFILE OF FIRM'S EXPERIENCE AND ANNUAL AVERAGE REVENUE FOR LAST 5 YEARS</b>

Function Code	Discipline	Number of Employees		Profile Code	Experience	Revenue Index Number
		Firm	Branch			
02	Administrative	33	6	H11	Housing (Residential, Multi-Family, Apts., Condos)	8
06	Architect	2		H07	Highways, Streets, Airfield Paving, Parking Lots	7
08	CAD Technician	1		E09	Environmental Impact Studies, Assessments	7
	Construction Materials Manager	10	3	T02	Testing & Inspection Services	6
	Drillers	29	10	C10	Commercial Buildings (low rise), Shopping Centers	6
24	Environmental Scientist	19	4	W01	Warehouses & Depots	5
	Environmental Technician	2		S05	Soils & Geologic Studies, Foundations	4
	Field Technicians	94	17	H10	Hotels, Motels	4
30	Geologist	6	2	O01	Office Buildings, Industrial Parks	4
	Hydrologist			101	Industrial Buildings, Manufacturing Plants	4
36	Industrial Hygiene			E02	Schools & Universities	4
	Lab Technician	14	4	A06	Airports, Terminals & Hangers, Freight Handling	4
	Professional Engineer	25	6	H09	Hospitals & Medical Facilities	4
48	Project Manager	59	25	P02	Petroleum & Fuel (Storage & Distribution)	3
	Soils Engineer			R02	Recreation Facilities (Parks, Marinas, Etc.)	3
				D07	Dining Halls, Clubs, Restaurants	3
				E12	Environmental Remediation	3
				S13	Stormwater Handling & Facilities	3
				H06	Highrise, Air-Rights-Type Buildings	3
				W03	Water Supply, Treatment & Distribution	3
<b>TOTAL:</b>		<b>294</b>	<b>77</b>			

<b>ANNUAL AVERAGE PROFESSIONAL SERVICES REVENUES OF FIRM FOR LAST 3 YEARS (Insert revenue index number as shown at right)</b>		<b>PROFESSIONAL SERVICES REVENUE INDEX NUMBER</b>			
a. Federal Work	3	1. Less than \$100,000	6. \$2 million to less than \$5 million		
b. Non-Federal Work	9	2. \$100,000 to less than \$250,000	7. \$5 million to less than \$10 million		
<b>c. Total Work</b>	<b>9</b>	3. \$250,000 to less than \$500,000	8. \$10 million to less than \$25 million		
		4. \$500,000 to less than \$1 million	9. \$25 million to less than \$50 million		
		5. \$1 million to less than \$2 million	10. \$50 million or greater		

<b>AUTHORIZED REPRESENTATIVE</b>	
SIGNATURE 	DATE May 12, 2025
NAME AND TITLE Joey Broussard, PE – Subsidiary Regional Vice President	

# APPENDIX A

## CERTIFICATIONS AND LICENSES

ALLIANT ENGINEERING, INC.

May 12, 2025



**ALLIANT**

CERTIFICATIONS AND LICENSES

# State of Florida

## Woman Business Certification

Meskel Associates and Engineering

Is certified under the provisions of  
287 and 295.187, Florida Statutes, for a period from:

04/29/2025 to 04/29/2027



Pedro Allende  
Florida Department of Management Services

FLORIDA DEPARTMENT OF MANAGEMENT SERVICES  
● ● SUPPLIER DEVELOPMENT



Office of Supplier Development  
4050 Esplanade Way, Suite 380  
Tallahassee, Florida 32399  
850-487-0915  
[www.dms.myflorida.com/osd](http://www.dms.myflorida.com/osd)

CERTIFICATIONS AND LICENSES

Ron DeSantis, Governor  
Melanie S. Griffin, Secretary

**FBPE**  
FLORIDA BOARD OF PROFESSIONAL ENGINEERS

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

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

**SPOUSE, WAYNE J**  
2820 SUMMERALL ROAD  
PLANT CITY FL 33567

LICENSE NUMBER: PE60021  
EXPIRATION DATE: FEBRUARY 28, 2027  
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Melanie S. Griffin, Secretary

**FBPE**  
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DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION  
BOARD OF PROFESSIONAL ENGINEERS

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

**MANSEN, ANDREW MORGAN**  
4575 GOLF BROOK ROAD  
ORANGE PARK FL 32065

LICENSE NUMBER: PE91277  
EXPIRATION DATE: FEBRUARY 28, 2027  
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Melanie S. Griffin, Secretary

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DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION  
BOARD OF PROFESSIONAL ENGINEERS

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**WIMPEE, CURTIS MARCEL**  
11410 WILDECROFT TERRACE  
JACKSONVILLE FL 32228

LICENSE NUMBER: PE79764  
EXPIRATION DATE: FEBRUARY 28, 2027  
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DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION  
BOARD OF PROFESSIONAL ENGINEERS

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

**OESTMAN, ADAM VIKTOR**  
12844 BEAUBIEN RD  
JACKSONVILLE FL 32238

LICENSE NUMBER: PE98440  
EXPIRATION DATE: FEBRUARY 28, 2027  
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Melanie S. Griffin, Secretary

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

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

**LANDING, DAVID REED**  
3072 GOLDEN POND BLVD  
ORANGE PARK FL 32065

LICENSE NUMBER: PE60483  
EXPIRATION DATE: FEBRUARY 28, 2027  
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Ron DeSantis, Governor  
Melanie S. Griffin, Secretary

**FBPE**  
FLORIDA BOARD OF PROFESSIONAL ENGINEERS

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**SCHOFIELD, JOSEPH RYAN**  
10405 FORTUNE HWY  
SUITE 301  
JACKSONVILLE FL 32238

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**KD52**

**COMMUNITY DEVELOPMENT DISTRICT**

**No. 2**

**10CII**

**KD52**

**Community Development District No. 2  
Response to RFQ for Engineering Services**

**May 2nd, 2025**

Prepared By:





May 2nd, 2025

Ms. Daphne Gillyard  
Director of Administrative Services  
Wrathell, Hunt and Associates, LLC  
2300 Glades Road, Suite 410W  
Boca Raton, Florida 33431

**Re: Proposal for Engineering Services  
Response to RFQ Published  
KD52 Community Development District No. 2**

Dear Ms. Gillyard:

Clearview Land Design is pleased to present qualifications and credentials to provide professional engineering services for the KD52 Community Development District No. 2.

Attached please find eight (8) copies of Standard Form 330 for your consideration.

We are confident our proposal will demonstrate the experience of Clearview Land Design's project team. Our team offers extensive experience with large scale master planned communities and has a history of working with over 20 Community Development Districts. We offer a combined 100+ years of planning, designing, inspecting and managing large scale master planned communities.

We will provide the ideal combination of technical capabilities, enthusiasm, and dedication necessary to meet the needs of the Community Development District.

Should you have any questions or need any additional information, please do not hesitate to contact me at (813) 223-3919.

Sincerely,

**CLEARVIEW LAND DESIGN P.L.**

A handwritten signature in black ink, appearing to read "Brian Surak", is written over a light blue horizontal line.

Brian Surak, P.E.  
District Engineer

cc: File w/attachments

## a b o u t o u r c o m p a n y

Clearview Land Design is a multi-disciplinary consulting firm focusing on land planning, civil engineering, landscape architecture and environmental services. The leadership group has vast experience in design, permitting, project management, and construction phase services for master-planned communities, roadways, and infrastructure associated with residential, commercial and mixed-use projects.

Beyond our unmatched expertise, Clearview offers personal attention to the unique synergies that are only achieved by decades-long relationships within the company and with agency staff. Clearview helps clients avoid time-consuming problems and can provide quick solutions when they are confronted with unavoidable challenges.

Clearview's proven team is dedicated to delivering solutions that are designed to be both functional and cost effective. By combining engineers, designers and planners under one roof, Clearview is able to streamline the design and development process and keep projects on schedule with a proactive approach with permitting agencies to expeditiously obtain required engineering permits for stormwater, utilities, and roadway design packages.

Our approach to projects couples our multi-discipline knowledge with years of permitting and development experience, to provide realistic and achievable time lines and budgets, ensuring that our Client's goals and expectations are met.

Our staff is committed to allocate necessary resources and personnel to deliver services in a timely manner. Clearview project managers meet regularly to evaluate production resources, milestone target dates, design and submittal schedules, and project status.

### We offer:

- Understanding District goals, expectations, and project budgets.
- Years of practice and understanding the needs and challenges associated with master-planned communities.
- Comprehensive coordination with the District Board and Team Members.
- Manage schedule and milestones.
- Local knowledge and understanding of site.
- Creative and flexible solutions.

Our key team members have worked closely with developers and Community Development Districts to provide multi-discipline consulting services. With our experience as engineers working both directly and indirectly with multiple CDDs, we are familiar with the process and committed to working with the KD52 CDD No. 2.

A more detailed account of our project and staff experience is outlined in the following pages of this document.



**Toxey Hall, P.E.**  
*President*

Before forming Clearview Land Design in 2009, Mr. Hall was with Heidt & Associates for 28 years, most recently as President and Owner. He has over 35 years of experience as a Civil Engineer. As president and Owner of Clearview, Toxey manages the day-to-day operations of Clearview. He has design and administrative experience in all aspects of commercial and residential land development engineering. He has administrative management experience with many multi-thousand acre mixed use projects in the Tampa region. Toxey is the former Chairman of the Urban Land Institute Tampa Bay District Council and serves on the National ULI Community Development Council.

Mr. Schrader is a founder and owner of Clearview Land Design, P.L. An Honors graduate of the University of Florida, Jordan is a Registered Professional Engineer, with over 10 years of engineering and surveying experience. Mr. Schrader is responsible for project management and design, including due diligence evaluations, community master planning, residential and commercial infrastructure design, construction services and management of multi-disciplinary consulting teams. He has successfully led project teams in Pasco County, Hillsborough County and the City of Tampa.



**Jordan Schrader, P.E.**  
*Vice President*



**Brian Surak, P.E.**  
*Senior Project Manager*

Mr. Surak has over 20 years of civil engineering consulting in private/public land development including residential subdivisions, multi-family, commercial/office centers, roadway, stormwater and multi-site projects. Services provided range from engineering design, project and personnel management, business development and marketing. Through experience and self-initiative, strong, successful relationships were created with clients, state, and local agency personnel and technical staff.

Mr. Smirch is an Honors graduate of the University of Florida and is a Registered Professional Engineer. With over 20 years of engineering and surveying experience, Mr. Smirch is a founder and Owner of Clearview Land Design. He is involved in all aspects of the engineering design process from master planning, design, and permitting through project certification of completion. Mike has successfully led project teams in Pasco, Hillsborough, Manatee, Pinellas, and Hernando counties and the City of Tampa.



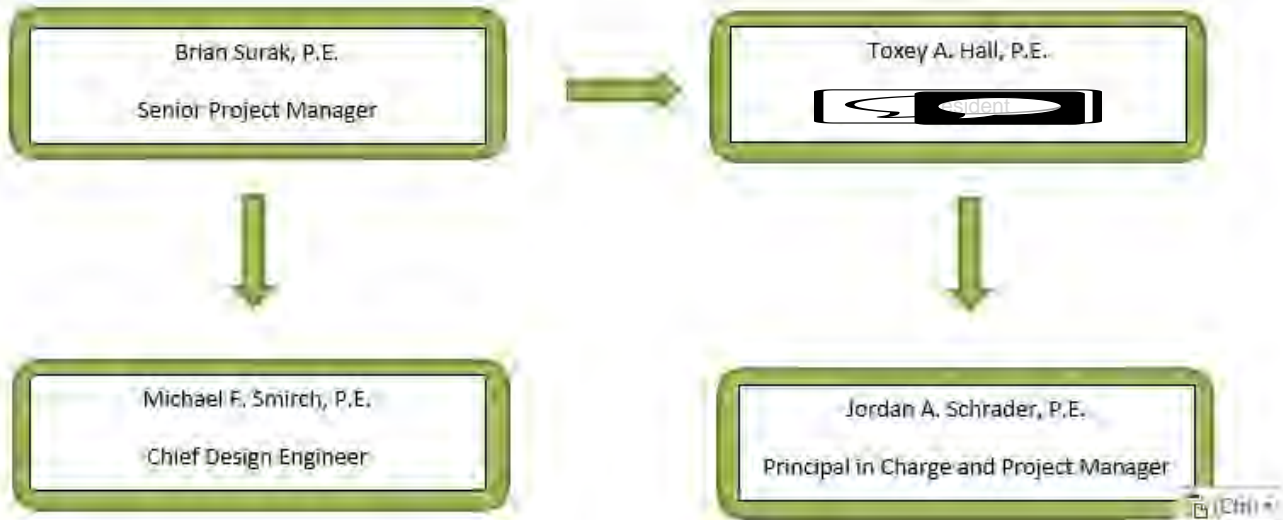
**Michael Smirch, P.E.**  
*Senior Vice President*



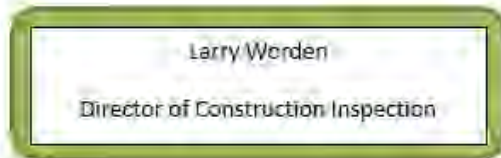
**Larry Worden**  
*Construction Inspector*

Mr. Worden has over 30 years of experience at Clearview Land Design and Heidt & Associates. He is responsible for site work inspection of underground utilities, sanitary pump stations, drainage ponds, storm water piping systems, roadways, parking, facilities, wetland creation areas, underground storm water vaults, and Conspan Bridge Systems for single-family developments, apartments, utility extensions, road extensions, road widening, commercial developments, parks, schools and churches.

Consulting Services



Construction Phase Services



# ARCHITECT - ENGINEER QUALIFICATIONS

## PART 1 - CONTRACT-SPECIFIC QUALIFICATIONS

### A. CONTRACT INFORMATION

1. TITLE AND LOCATION <i>(City and State)</i> <b>KD52 Community Development District No. 2 (Pasco County, Florida)</b>	
2. PUBLIC NOTICE DATE <b>May 2nd, 2025</b>	3. SOLICITATION OR PROJECT NUMBER

### B. ARCHITECT-ENGINEER POINT OF CONTACT

4. NAME AND TITLE <b>Brian Surak, Senior Project Manager</b>		
5. NAME OF FIRM <b>Clearview Land Design, P.L.</b>		
6. TELEPHONE NUMBER <b>(813) 223-3919</b>	7. FAX NUMBER <b>(813) 223-3975</b>	8. E-MAIL ADDRESS <b>Brian.Surak@clearviewland.com</b>

### C. PROPOSED TEAM

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

	<i>(Check)</i>			9. FIRM NAME	10. ADDRESS	11. ROLE IN THIS CONTRACT
	PRIME	J-V PARTNER	SUBCONTRACTOR			
a.	X			Clearview Land Design, P.L.  <input type="checkbox"/> CHECK IF BRANCH OFFICE	3010 West Azelee Street, Suite 150. Tampa, FL 33609	Civil Engineering Firm offering land planning, GIS, landscape architecture, environmental science and construction services
b.				  <input type="checkbox"/> CHECK IF BRANCH OFFICE		
c.				  <input type="checkbox"/> CHECK IF BRANCH OFFICE		
d.				  <input type="checkbox"/> CHECK IF BRANCH OFFICE		
e.				  <input type="checkbox"/> CHECK IF BRANCH OFFICE		
f.				  <input type="checkbox"/> CHECK IF BRANCH OFFICE		

**E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT**

*(Complete one Section E for each key person.)*

12. NAME <b>Toxey Hall, P.E.</b>	13. ROLE IN THIS CONTRACT President Clearview Land Design Senior Project Manager	14. YEARS EXPERIENCE	
		a. TOTAL 43	b. WITH CURRENT FIRM 15
15. FIRM NAME AND LOCATION <i>(City and State)</i> Clearview Land Design, P.L.			
16. EDUCATION <i>(DEGREE AND SPECIALIZATION)</i> Bachelor of Science, Civil Engineering University of Florida		17. CURRENT PROFESSIONAL REGISTRATION <i>(STATE AND DISCIPLINE)</i> Urban Land Institute; Association of Florida Community Developers; Tampa Bay Builders Association, Life Director-NAHB; American Society of Civil Engineers; Florida Engineering Society; National Society of Professional Engineers	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i> Registered Professional Engineer, State of Florida			

**19. RELEVANT PROJECTS**

(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
<b>New Tampa Corridor, Hillsborough County, Florida</b>	2000-Ongoing	2006-Ongoing
a. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE In the City of Tampa, the 25-thousand acre "New Tampa Corridor" consisted of large-scale community development that created a "city within a city". Of the fourteen major projects that coordinated planning and infrastructure in this area, Toxey was project manager for eight of them including Tampa Palms, Hunter's Green, and Highwoods Preserve.	<input checked="" type="checkbox"/> Check if project performed with current firm	
<b>Museum of Science and Industry Expansion, City of Tampa, Florida</b>	2002-2008	2010
b. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Civil Engineering Project Manager for the expansion of the Tampa Museum of Science and Industry from 67,000 to 244,000 square feet with the addition of 500 parking spaces. While the usual challenges associated with commercial construction were present, the MOSI project involved several interesting and innovative site concepts.	<input type="checkbox"/> Check if project performed with current firm	
<b>Harbour Island, City of Tampa, Florida</b>	2002	2004-Ongoing
c. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Project Manager for 178-ac. 15-phase urban mixed-use project. This dense environment ranged from single family detached to mid-rise condominium projects. Challenges included "surcharging" and other design methods to deal with construction on a spoil island under which was several feet of original bay bottom muck. The entire island was constructed with vertical sea walls and "dockominium" boat slips. A master stormwater pond system (with several pumped stormwater vaults) minimized the stormwater footprint, and a linear "greenway" trail system runs the length of the island.	<input checked="" type="checkbox"/> Check if project performed with current firm	
<b>Beacon Apartments- Downtown St. Petersburg, Florida</b>	2014-2015	2015-2016
d. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE A significant urban infill redevelopment effort covering a two-city-block footprint in Downtown St. Petersburg. The project consisted of seven and nine story buildings with parking garages that accommodated a total of 692 units. Plan included a stormwater vault, multiple courtyards and motorcourts.	<input checked="" type="checkbox"/> Check if project performed with current firm	
<b>Highwoods Preserve – City of Tampa, Florida</b>	2004-2010	2004-2014
e. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Project manager for this 93 acre, one million square foot high tech office campus. Construction of seven integrated "campus" style mid-rise office buildings, with surface parking and parking garages totaling 3,700 spaces, enabled us to gain significant open space as opposed to maximizing floor area ratio.	<input type="checkbox"/> Check if project performed with current firm	

**E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT**

*(Complete one Section E for each key person.)*

12. NAME <b>Brian Surak, P.E.</b>	13. ROLE IN THIS CONTRACT Civil Engineer Project Manager	14. YEARS EXPERIENCE	
		a. TOTAL <b>34</b>	b. WITH CURRENT FIRM <b>8</b>
15. FIRM NAME AND LOCATION <i>(City and State)</i> Clearview Land Design, P.L.			
16. EDUCATION <i>(DEGREE AND SPECIALIZATION)</i> Bachelor of Science, Civil Engineering Florida State University		17. CURRENT PROFESSIONAL REGISTRATION <i>(STATE AND DISCIPLINE)</i> Registered Professional Engineer Number 59064 State of Florida	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i> Urban Land Institute Tampa Bay Builders Association			

**19. RELEVANT PROJECTS**

(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
<b>Connerton Village 2, Pasco County, Florida</b>	PROFESSIONAL SERVICES 2004 - 2008	CONSTRUCTION <i>(If applicable)</i> 2006 -2008
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <span style="float: right;"><input type="checkbox"/> Check if project performed with current firm</span> a. Project Manager & District Engineer for Connerton Villages 2, which included multiple sub-phases and the central community amenity center. Services coordinated included drainage modeling and surface water management design, roadway, storm, and utility infrastructure design, environmental and local agency permitting, engineering services during construction, construction contract management, and district engineering services.		
<b>Dupree Lakes, Pasco County, Florida</b>	PROFESSIONAL SERVICES 2009 - 2016	CONSTRUCTION <i>(If applicable)</i> 2009 - 2016
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <span style="float: right;"><input checked="" type="checkbox"/> Check if project performed with current firm</span> b. Project Manager & District Engineer for Dupree Lakes, a 670-lot single family residential community. Services coordinated included drainage modeling and surface water management design, roadway, storm, and utility infrastructure design, environmental and local agency permitting, engineering services during construction, construction contract management, and district engineering services.		
<b>Florida Hospital at Bexley, Pasco County, Florida</b>	PROFESSIONAL SERVICES 2016 - On-Going	CONSTRUCTION <i>(If applicable)</i> 2016 - On-Going
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <span style="float: right;"><input checked="" type="checkbox"/> Check if project performed with current firm</span> c. Provided project management and design engineering for 46,000+ SF proposed medical office and emergency room facility with phased buildings and parking. Coordinated approval of alternative standards for parking and buffers.		
<b>Avalon Park West, Pasco County, Florida</b>	PROFESSIONAL SERVICES 2014 - Present	CONSTRUCTION <i>(If applicable)</i> 2016 - Present
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <span style="float: right;"><input checked="" type="checkbox"/> Check if project performed with current firm</span> d. Project Manager and Design Engineer for master planned community, consisting of various neighborhoods, parks, and a town center. The 1,800 acre project includes 4,800 residential units and 680,000 square feet of commercial/office. Design services provided include stormwater modeling, roadway and utility design, and neighborhood design for both permitting and construction phases.		
<b>Bexley, Pasco County, Florida</b>	PROFESSIONAL SERVICES 2002 – On-Going	CONSTRUCTION <i>(If applicable)</i> On-Going
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <span style="float: right;"><input checked="" type="checkbox"/> Check if project performed with current firm</span> e. Project Manager for Bexley Ranch DRI / MPUD. Project management, design and permitting for the early phases of the Bexley DRI, a +/-6,900-acre development located in Pasco County, Florida. Services provided include DRI engineering and analysis, master stormwater permitting, management/design of the first +/-1,000 residential lots. Design/Permitting services provided include stormwater modeling, roadway and utility design, and neighborhood design.		

**E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT**

*(Complete one Section E for each key person.)*

12. NAME <b>Jordan A. Schrader, P.E.</b>	13. ROLE IN THIS CONTRACT <b>Assistant District Engineer</b>	14. YEARS EXPERIENCE	
		a. TOTAL 16	b. WITH CURRENT FIRM 15
15. FIRM NAME AND LOCATION <i>(City and State)</i> Clearview Land Design, P.L. (Tampa, FL)			
16. EDUCATION <i>(DEGREE AND SPECIALIZATION)</i> Bachelor of Science, Civil Engineering University of Florida		17. CURRENT PROFESSIONAL REGISTRATION <i>(STATE AND DISCIPLINE)</i> Registered Professional Engineer Number 74798 State of Florida	

18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*  
 Urban Land Institute, Vice Chair – Channel District Redevelopment Agency

**19. RELEVANT PROJECTS**

(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
a. <b>The Woods (Pasco County, FL)</b>  (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Design Engineer and Project Manager for this 400-acre residential development consisting of 250 single-family units, 25,000 square feet of commercial and a Pasco County Elementary School Site within the Cypress Creek watershed.	On-Going	On-Going
	<input type="checkbox"/> Check if project performed with current firm	
b. <b>Magnolia Park (Hillsborough County, FL)</b>  (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Design, Project Management and District Management for this 580-acre mixed-use development consisting of 1,200 residential units, 125,000 square feet of commercial development, 60,000 square feet of office/professional and 770,000 square feet of industrial use.	On-Going	On-Going
	<input type="checkbox"/> Check if project performed with current firm	
c. <b>Meadow Pointe (Pasco County, FL)</b>  (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Design Engineer and Project Management for this master-planned community in Pasco County. Responsibilities include master planning efforts, rezoning and entitlement assistance, master drainage, water and sewer planning, subdivision design, permitting and platting efforts.	On-Going	On-Going
	<input type="checkbox"/> Check if project performed with current firm	
d. <b>Gandy Wal-Mart (Tampa, FL)</b>  (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Design Engineer for the redevelopment of multiple parcels and the construction of 125,000 square foot free standing Wal-Mart. In addition to the standard redevelopment challenges, services included the assemblage of multiple parcels and off-site roadway improvements.	2009	2009
	<input type="checkbox"/> Check if project performed with current firm	
e.  (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE	  	  
	<input type="checkbox"/> Check if project performed with current firm	

**E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT**

*(Complete one Section E for each key person.)*

12. NAME <b>Michael F. Smirch, P.E.</b>	13. ROLE IN THIS CONTRACT Chief Design Engineer	14. YEARS EXPERIENCE	
		a. TOTAL <b>27</b>	b. WITH CURRENT FIRM <b>15</b>
15. FIRM NAME AND LOCATION <i>(City and State)</i> Clearview Land Design, P.L. (Tampa, FL)			
16. EDUCATION <i>(DEGREE AND SPECIALIZATION)</i>  Bachelor of Science in Civil Engineering With Honors University of Florida, 1998		17. CURRENT PROFESSIONAL REGISTRATION <i>(STATE AND DISCIPLINE)</i>  Registered Professional Engineer Number 59503 State of Florida	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i> Member of Florida Engineering Society			

**19. RELEVANT PROJECTS**

(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
<b>Oakstead, Pasco County, Florida</b>	1998	2007
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <span style="float: right;"><input type="checkbox"/> Check if project performed with current firm</span> a. Senior Utilities & Drainage Design Engineer for an 852-acre development with 1,184 single-family units. Project activities included master planning, engineering design, ERP permitting and construction phasing within the Anclote River watershed. The project consisted of several phases of residential lots, roadways and associated stormwater management systems involving 40 interconnected wetlands & detention ponds.		
<b>FishHawk Towncenter/Osprey Ridge Drive Hillsborough County, FL</b>	2003	2009
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <span style="float: right;"><input type="checkbox"/> Check if project performed with current firm</span> b. Senior Drainage Design Engineer for 500 ac. master-planned community included drainage design, construction phasing of 21 wet detention ponds and wetlands treatment facilities. Required the design and construction of more than 700 drainage structures and 10-miles of storm sewer serving over 1,000 residential units.		
<b>WaterGrass, Pasco County, FL</b>	2006	Present
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <span style="float: right;"><input type="checkbox"/> Check if project performed with current firm</span> c. Senior Drainage Design Engineer for the easterly region of Watergrass consisting of 508-acres with 869 single-family lots. Project activities included master drainage planning & design of 50 interconnected pond and wetland systems, 500 drainage structures, street & lot grading, engineering design, ERP permitting, and construction phasing within the New River watershed.		
<b>Bexley, Pasco County, FL</b>	2012 - Present	2013 - Present
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <span style="float: right;"><input checked="" type="checkbox"/> Check if project performed with current firm</span> d. Chief drainage and utilities design engineer for the 1,800 acre master planned community.		
<b>Westpark Village Towncenter, Hillsborough County, FL</b>	1999	2004
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <span style="float: right;"><input type="checkbox"/> Check if project performed with current firm</span> e. Senior Drainage Design Engineer and Senior Utilities Design Engineer for a 160-acre mixed-use development consisting of 368 single-family units, 693 multi-family units, 50 townhomes, 40,000 square feet of commercial development, passive parks, and a 5,000 square-foot community pool. This project was Hillsborough County's first Neo-Traditional Neighborhood.		

**E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT**

*(Complete one Section E for each key person.)*

12. NAME <b>Larry H. Worden, Jr.</b>	13. ROLE IN THIS CONTRACT Construction Management / Field Management	14. YEARS EXPERIENCE	
		a. TOTAL <b>41</b>	b. WITH CURRENT FIRM <b>15</b>
15. FIRM NAME AND LOCATION <i>(City and State)</i> Clearview Land Design, P.L. (Tampa, FL)			
16. EDUCATION <i>(DEGREE AND SPECIALIZATION)</i>		17. CURRENT PROFESSIONAL REGISTRATION <i>(STATE AND DISCIPLINE)</i>	

18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*  
 Qualifications include Stormwater Erosion, Sedimentation Control Inspector Training, OSHA Trench Safety Training, Survey Mathematics Course Certificate, FDOT Certifications in Asphalt Level 1 & 2, Earthwork Inspection Level 1 & 2 and Maintenance of Traffic Intermediate Course.

**19. RELEVANT PROJECTS**

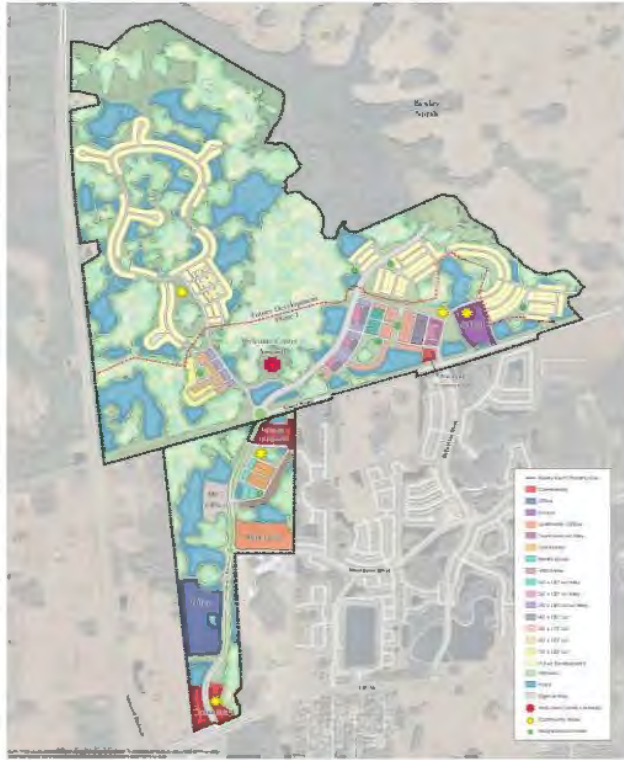
(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
<b>Connerton (Land O' Lakes, FL)</b>	PROFESSIONAL SERVICES 2008 - Ongoing	CONSTRUCTION <i>(If applicable)</i> 2008 - Ongoing
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <span style="float: right;"><input type="checkbox"/> Check if project performed with current firm</span> a. Connerton is made up of 8,000 acres of former Ranch Land. A 3000-acre tract of land was set aside for a nature preserve. Duties included getting final approval and release of performance and maintenance bonds for a half dozen communities that had been in limbo for years. Since 2017 I have been the Construction Inspector for Village 218 area that has 259 home sites. An additional 2 Villages are scheduled to begin construction soon.		
<b>Seven Oaks (Wesley Chapel, FL)</b>	PROFESSIONAL SERVICES 2000 - 2008	CONSTRUCTION <i>(If applicable)</i> 2000 - 2008
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <span style="float: right;"><input type="checkbox"/> Check if project performed with current firm</span> b. Seven Oaks encompassed about 2.75 square miles of land and is home to over 3,500 people. There are several large businesses, apartment complexes, office parks and a 4.5 million dollars recreation center in the center of the community. I was the Construction Inspector for all infrastructure from the start of construction until 2008.		
<b>Bexley (Land O' Lakes, FL)</b>	PROFESSIONAL SERVICES 2014 - Ongoing	CONSTRUCTION <i>(If applicable)</i> 2014 - Ongoing
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <span style="float: right;"><input type="checkbox"/> Check if project performed with current firm</span> c. Bexley is a 1,700 acre Master Planned Community in Land O' Lakes. I have been the Construction Inspector for all Construction to date. Bexley has received numerous awards. One of the most rewarding parts of my job was helping find a path for several long boardwalks through wooded wetlands. It has also been rewarding to see the wildlife utilizing the retention ponds and wetland creation areas throughout the community.		
<b>Meadow Pointe (Wesley Chapel, FL)</b>	PROFESSIONAL SERVICES 1990 - Ongoing	CONSTRUCTION <i>(If applicable)</i> 1990 - Ongoing
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <span style="float: right;"><input type="checkbox"/> Check if project performed with current firm</span> d. The last village in Meadow Pointe is under construction. There are 8,378 residential homes in Meadow Pointe. I have been the Construction Inspector for the infrastructure from the beginning of the project until the present time. The project included the construction of 6.5 miles of County Line Road and 4 miles of Meadow Pointe Boulevard. 47 separate villages make up the Meadow Pointe Community.		
<b>Magnolia Park (Riverview, FL)</b>	PROFESSIONAL SERVICES 2008 - 2016	CONSTRUCTION <i>(If applicable)</i> 2018 - 2017
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <span style="float: right;"><input type="checkbox"/> Check if project performed with current firm</span> e. Clearview at first provided free phone consults and some leg work to help the Developer through some difficult challenges. After the merger of two Developers things were getting very complicated and there were numerous commitment deadlines looming. Before long we were finishing up approved projects by the previous Engineer and Designing the remainder of the project. There are only a few home sites left in this community.		

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER <b>1</b>
21. TITLE AND LOCATION <i>(City and State)</i> <b>Bexley (Pasco County, FL)</b>		22. YEAR COMPLETED PROFESSIONAL SERVICES: <b>2010 - On-Going</b> CONSTRUCTION <i>(If applicable)</i> : <b>On-Going</b>

**23. PROJECT OWNER'S INFORMATION**

a. PROJECT OWNER <b>Newland Communities</b>	b. POINT OF CONTACT <b>Aaron Baker</b>	c. POINT OF CONTACT TELEPHONE NUMBER <b>813-620-3555</b>
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**24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT**



Bexley, the award-winning master planned community is located along State Road 54 near the Suncoast Parkway in Pasco County. Bexley South comprises over 1,700 acres for which Clearview has provided engineering, permitting and inspection services as well as CDD Engineering Services. It is planned for 1,200 single family homes and 520 multi-family units, and over 650,000 square feet of office and retail. Multiple parks and interconnected trails systems link residential and non-residential uses. Additionally, the Clearview team has been involved in community planning, entitlements, mass grading plans, all infrastructure design, and neighborhood grading. The project includes a master planned stormwater system, water distribution system, reclaimed water distribution system and wastewater collections system. The stormwater system with over 50 ponds was a particularly critical component due to the project's location adjacent to the Sandy Branch and Anclote River.



**25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT**

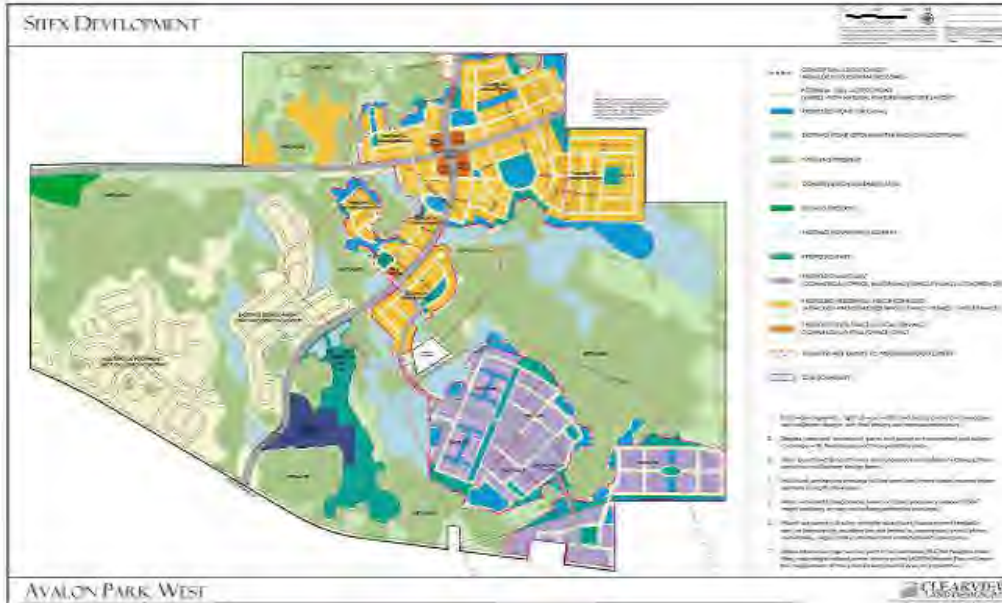
(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
a. <b>Clearview Land Design, P.L.</b>	<b>Tampa, FL</b>	<b>Civil Engineering, Land Planning, GIS, Construction Inspection</b>
b.		
c.		
d.		
e.		
f.		

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> (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) <b>Avalon Park West (Pasco County, FL)</b>		22. YEAR COMPLETED PROFESSIONAL SERVICES: 2010 - On-Going CONSTRUCTION (If applicable): On-Going

**23. PROJECT OWNER'S INFORMATION**

a. PROJECT OWNER <b>Sitex Development Group</b>	b. POINT OF CONTACT <b>Ross Halle</b>	c. POINT OF CONTACT TELEPHONE NUMBER <b>407-658-6565</b>
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT



Located in Wesley Chapel, Avalon Park West is a master planned community with village type mixed-use neighborhoods, schools, a town center, abundant community parks and vast preserved upland and wetland habitat. Clearview Land Design has been involved in land planning, rezoning, stormwater modeling and master planning, landscape architecture, permitting, and construction phase services for the project. The near 1,800 acre project includes over 800 acres of preservation area and 40 acres of parks. The community will be home to 4,800 residential units, including single family attached, single family detached, and multi-family and 680,000 square feet of mixed-use, commercial and office space.

**25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT**

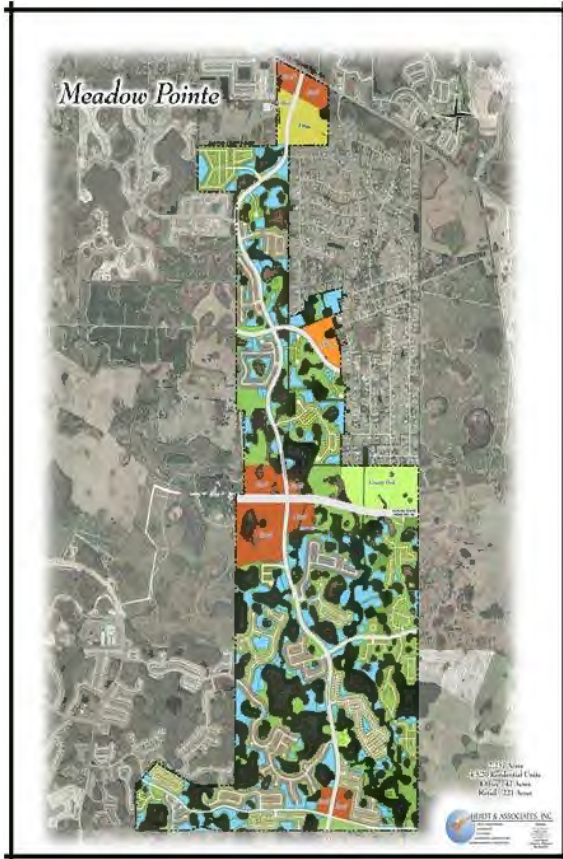
(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
a. Clearview Land Design, P.L.	Tampa, FL	Civil Engineering, GIS, Land Planning, Landscape Architecture, Construction Inspection
b.		
c.		
d.		
e.		
f.		

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> (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 <b>3</b>
21. TITLE AND LOCATION (City and State) <b>Meadow Pointe (Pasco County, FL)</b>		22. YEAR COMPLETED PROFESSIONAL SERVICES: 2009 - Current CONSTRUCTION (If applicable): 2009 - Current

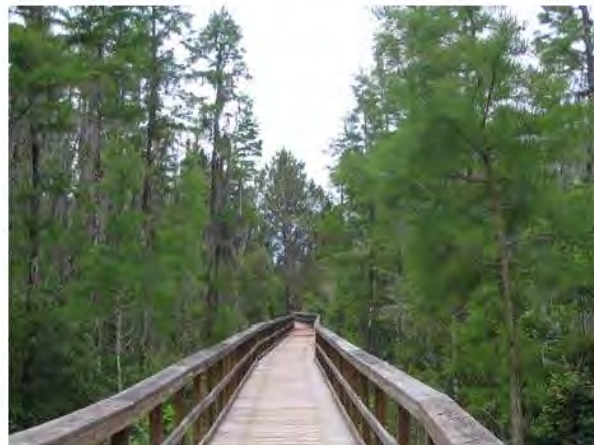
**23. PROJECT OWNER'S INFORMATION**

a. PROJECT OWNER <b>CalAtlantic Homes</b>	b. POINT OF CONTACT <b>Thomas Spence</b>	c. POINT OF CONTACT TELEPHONE NUMBER <b>813-288-7687</b>
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**24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT**



Meadow Pointe is an award-winning master planned community in southern Pasco County. For the past 20 years, Meadow Pointe has been one of the fastest selling communities in the State of Florida. Covering over 4,000 acres and consisting of over 7,000 residential units along with retail/office, schools, parks and numerous amenity centers, Meadow Pointe has become a favorite community to live, work and play. The Clearview Team's role in this project has included master planning efforts, rezoning actions and entitlement assistance; master infrastructure design and permitting, including drainage and water and sewer utility systems; and neighborhood design, permitting and platting efforts, and construction phase services.



**25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT**

a.	(1) FIRM NAME <b>Clearview Land Design, P.L.</b>	(2) FIRM LOCATION (City and State) <b>Tampa, FL</b>	(3) ROLE <b>Civil Engineering, GIS, Land Planning, Construction Inspection</b>
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

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER <div style="border: 1px solid black; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center; margin: 0 auto;">4</div>
21. TITLE AND LOCATION <i>(City and State)</i> <b>Connerton, Pasco County, Florida</b>	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES 2015	CONSTRUCTION <i>(If applicable)</i> On-going

**23. PROJECT OWNER'S INFORMATION**

a. PROJECT OWNER Connerton Development Holdings, LLC	b. POINT OF CONTACT Ashley Becker	c. POINT OF CONTACT TELEPHONE NUMBER (214) 302-0060
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT

Clearview Land Design is currently the Connerton West CDD Engineer and is also providing civil engineering, land planning, landscape architecture, construction inspection, and GIS services for the 4,800 acre master planned community.

Ultimately, the project may accommodate 8,000 residences, 2 million square feet of a mix of commercial, office, civic, medical, and industrial space. over 500 acres of Habitat Management Area, 168 acres of District and Neighborhood Parks, a large preserve dedicated to the Water Management District, and Critical Wildlife Corridors. Two school sites, a town center, and a government complex will serve residents day to day needs.



**25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT**

(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
a. Clearview Land Design	Tampa, Florida	CDD Engineer, Civil Engineering, Planning, Landscape Architecture, Inspection, GIS
b.		
c.		
d.		
e.		
f.		

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER <p style="text-align: center;">5</p>
21. TITLE AND LOCATION <i>(City and State)</i> <b>Magnolia Park (Hillsborough County, FL)</b>		22. YEAR COMPLETED PROFESSIONAL SERVICES: 2009 - On-Going CONSTRUCTION <i>(If applicable)</i> : On-Going

**23. PROJECT OWNER'S INFORMATION**

a. PROJECT OWNER <b>Pulte Homes</b>	b. POINT OF CONTACT <b>Sean Strickler</b>	c. POINT OF CONTACT TELEPHONE NUMBER <b>813-964-5169</b>
--	--	---

24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT

Clearview Land Design offers planning, design, and inspection services for the 580 acre master planned community to both the developer and Magnolia Park CDD. The project has been under construction for approximately ten years and close to build out by Pulte Homes. It consists of 1,200 residential units, 125,000 square feet of commercial, 60,000 square feet of office/professional and 770,000 square feet of industrial use. The project serves numerous areas of Tampa and surrounding regions due to its convenient central location and access to major transportation corridors. It is a first time to second level buyer neighborhood with strategically located passive parks and amenity centers to meet the social and recreational needs of the residents.



**25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT**

(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
a. Clearview Land Design, P.L.	Tampa, FL	Civil Engineering, GIS, Land Planning, Landscape Architecture, Construction Inspection
b.		
c.		
d.		
e.		
f.		

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER <b>6</b>
21. TITLE AND LOCATION <i>(City and State)</i> <b>Mira Bay (Hillsborough County, FL)</b>	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES <b>2009 - On-Going</b>	CONSTRUCTION <i>(If applicable)</i> <b>On-Going</b>

**23. PROJECT OWNER'S INFORMATION**

a. PROJECT OWNER <b>Newland Communities</b>	b. NAME OF CONTACT 	c. POINT OF CONTACT TELEPHONE NUMBER <b>813-620-3555</b>
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT



Mirabay is a 720-acre premier master planned community located in Hillsborough County on Tampa Bay. Upon completion, it will accommodate approximately 1,750 homes and 300,000 square feet of office and retail use. This project included master planning, engineering design and permitting and construction phasing. The project consisted of several phases of waterfront residential lots, roadways and associated stormwater management systems. The project included a 3.5 miles canal system and a 135 acre lagoon which conveyed several thousand acres of offsite runoff through a boatlift weir structure to Tampa Bay.

**25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT**

	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
a.	Clearview Land Design, P.L.	Tampa, FL	Civil Engineering, Land Planning, Landscape Architecture, GIS, Construction Inspection
b.			
c.			
d.			
e.			
f.			

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> (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) <b>Vista Palms (fka Sunshine Village)          (Hillsborough County, FL)</b>		22. YEAR COMPLETED PROFESSIONAL SERVICES: 2010 - On-Going CONSTRUCTION (If applicable): On-Going

**23. PROJECT OWNER'S INFORMATION**

a. PROJECT OWNER <b>Lennar</b>	b. POINT OF CONTACT <b>Parker Hiron</b>	c. POINT OF CONTACT TELEPHONE NUMBER <b>813-574-5658</b>
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT



Sunshine Village is a community located in south Hillsborough County. Clearview Land Design is involved with planning, civil engineering, landscape architecture, permitting, and construction inspection and is CDD Engineer for the +/- 800 acre project that includes over 2,500 residential units, over 150,000 square feet of commercial development, two large amenity centers, and many pocket parks.

**25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT**

a.	(1) FIRM NAME <b>Clearview Land Design, P.L.</b>	(2) FIRM LOCATION (City and State) <b>Tampa, FL</b>	(3) ROLE <b>Civil Engineering, GIS, Land Planning, Landscape Architecture, Construction Inspection</b>
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

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER <b>8</b>
21. TITLE AND LOCATION <i>(City and State)</i> <b>Trillium (Pasco County, FL)</b>	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES <b>On-Going</b>	CONSTRUCTION <i>(If applicable)</i> <b>On-Going</b>

**23. PROJECT OWNER'S INFORMATION**

a. PROJECT OWNER <b>Pulte Homes</b>	b. POINT OF CONTACT <b>Sean Strickler</b>	c. POINT OF CONTACT TELEPHONE NUMBER <b>813-964-5169</b>
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT



Northwest of Tampa, Trillium is located in Brooksville, on the outskirts of Land O'Lakes. The single family community has a private resort style community swimming pool with cabana's, a shaded playground and miles of miles of pedestrian oriented sidewalks for leisure and recreation.

**25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT**

a.	(1) FIRM NAME <b>Clearview Land Design, P.L.</b>	(2) FIRM LOCATION <i>(City and State)</i> <b>Tampa, FL</b>	(3) ROLE <b>Civil Engineering, GIS, Land Planning, Landscape Architecture, Construction Inspection</b>
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>	20. EXAMPLE PROJECT KEY NUMBER <b>9</b>
---	--

21. TITLE AND LOCATION <i>(City and State)</i> <b>Tampa Palms (Tampa, FL)</b>	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES <b>On-Going</b>	CONSTRUCTION <i>(If applicable)</i> <b>On-Going</b>

**23. PROJECT OWNER'S INFORMATION**

a. PROJECT OWNER <b>Tampa Palms</b>	b. POINT OF CONTACT <b>Jim Apthorp</b>	c. POINT OF CONTACT TELEPHONE NUMBER <b>(850) 251-5508</b>
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT

Toxey Hall was responsible for designing and managing this large scale mixed-use development project. Tampa Palms is a 6,200-acre project that first began to define the "New Tampa" area. The City sized project included a master planned water distribution system and a master planned sanitary sewer system including approximately 20 pumping stations, including a highly complex dual triplex station with two 12-foot diameter wetwells. The stormwater system included approximately 120 ponds and was a particularly critical component due to the project's location adjacent to Trout Creek and the Hillsborough River. The amenities designed by Toxey and Bill included a golf course, golf course club house, several community "country clubs", multiple internal parks and related buildings, courts, playfields, etc. Of particular interest was the "Canoe Outpost" park on the Hillsborough River. This environmentally sensitive park included a canoe launch, hiking trails, picnic areas, boardwalks and a wildlife viewing area.



Tampa Palms continues to be a standard for Master Planned communities with its many neighborhood parks, interconnected trail system and use of native landscaping. Environmental services included wetland delineations and wetland impact permitting through the Corps of Engineers, DEP, SWFWMD and the Hillsborough County EPC. Mitigation design was performed, permitted and implemented.

**25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT**

a.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
	<b>*Heidt &amp; Associates, Inc.</b>	<b>Tampa, FL</b>	<b>Civil Engineering, Landscape Architecture, Surveying</b>
b.	(1) FIRM NAME <i>*NOTE: The Principals of Clearview Land Design were the previous Owners of Heidt &amp; Associates, Inc.</i>	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE



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**H. ADDITIONAL INFORMATION**

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

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**I. AUTHORIZED REPRESENTATIVE**

*The foregoing is a statement of facts.*

31. SIGNATURE

32. DATE

05/05/2025

33. NAME AND TITLE

Brian Surak, P.E., Senior Project Engineer



**KD52**

**COMMUNITY DEVELOPMENT DISTRICT**

**No. 2**

**10CIII**

# KD52 Community Development District

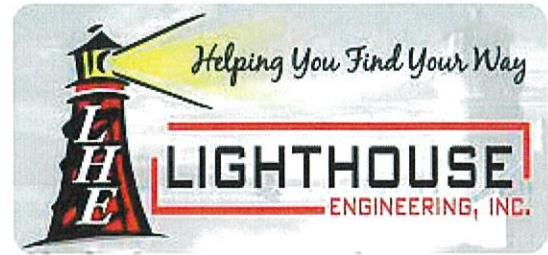
Professional Services Continuing Contract



May 8, 2025

Cindy Cerbone  
Wrathell, Hunt & Associates, LLC  
2300 Glades Road, Suite 410 W  
Boca Raton, FL 33431

**Re: KD52 Community Development District – Engineering Services**



Dear Selection Committee,

Lighthouse Engineering (LHE) submits this proposal for professional services with a strong interest in entering a partnership with The KD52 Community Development District (CDD) as your **District Engineer**. LHE is a multi-discipline civil/site engineering firm with three senior professional engineers and affiliates who are highly qualified for this work. 1 (one) electronic copy and 1 (one) hard copy are included in this proposal.

Lighthouse Engineering  
has professionals  
experienced with CDD  
operations.

Lighthouse Engineering (LHE) provided engineering services for Meadow Pointe II CDD in Wesley Chapel, Florida with Bob Nanni as the District Manager. We are currently serving as District Engineer for Harbor Bay CDD in Hillsborough County, Florida with Jordan Lansford as District Manager, Asturia CDD in Pasco County, Florida with Barry Jeskewich as District Manager, Parkview at Long Lake Ranch CDD with Jamie Sanchez as District Manager and Lakeside Plantation CDD with Jordan Lansford as District Manager.

**WHY HIRE LHE? Quite simply, we offer the best value for our professional services. LHE is an engineering firm with very competitive overhead and the highest quality standards. Our engineers have a combined experience of over 100 years and this knowledge allows us to examine, evaluate and quickly solve both complex and minor tasks. We feel this knowledge provides the best value for our clients.**

LHE provides this value through having executive/ senior professionals that are highly qualified for their work. In addition, our operations run efficiently through purchasing and acquiring the same or greater IT infrastructure and office equipment utilized by our competitors and placing them in home offices. As the District Engineer, we would adopt a **safety-first approach**. We will protect the safety of the community first and foremost. We will support the **economic** interests of the community through adhering to capital budgeting requirements. For our part, we commit that we will provide the engineering services for the CDD in accordance with the budget.

**WHY IS THIS IMPORTANT TO THE CDD? It means that our engineering work is easily bid by contractors and produces regular low bids for work. Also, Design-Build projects typically have zero change orders. This allows the CDD to finish more work with fewer financial and management resources.**

If you wish to discuss our abilities further, we will welcome the opportunity to meet face to face with you.

If you have any additional questions, please let us know.

Sincerely,

A handwritten signature in blue ink that reads 'Bradley A. Foran'.

**Brad Foran, PE**  
**Lighthouse Engineering, Inc.**

Lighthouse Engineering, Inc.  
701 Enterprise Road East, Suite 410  
Safety Harbor, FL 34695  
727-726-7856 (office) 727-683-9848 (fax)

# ARCHITECT – ENGINEER QUALIFICATIONS

## PART I – CONTRACT SPECIFIC QUALIFICATIONS

### A. CONTRACT INFORMATION

1. TITLE AND LOCATION <i>(City and State)</i> <b>KD52 Community Development District – Professional Engineering Services – continuous contract</b>		
2. PUBLIC NOTICE DATE May 8, 2025	3. SOLICITATION OR PROJECT NUMBER	

### B. ARCHITECT – ENGINEER POINT OF CONTACT

4. NAME AND TITLE Brad Foran, P.E., President		
5. NAME OF FIRM Lighthouse Engineering, Inc.		
6. TELEPHONE NUMBER 727.726.7856	7. FAX NUMBER 727.683.9848	8. E-MAIL ADDRESS bforan@lighthouseenginc.com

### C. PROPOSED TEAM

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

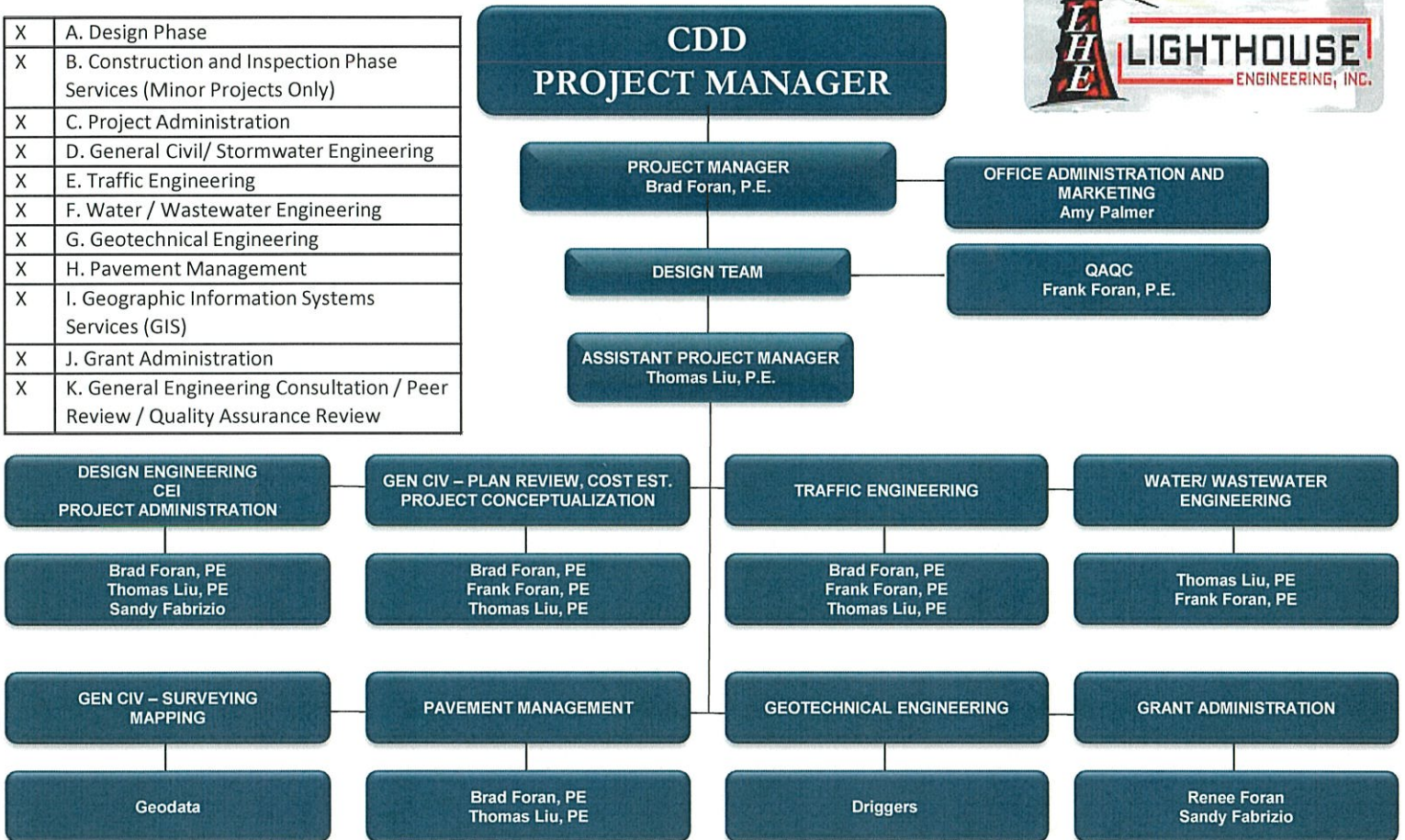
	<i>(Check)</i>			9. FIRM NAME	10. ADDRESS	11. ROLE IN THIS CONTRACT
	PRIME	J-V PARTNER	SUBCON-TRACTOR			
a.	<input checked="" type="checkbox"/>			<b>Lighthouse Engineering, Inc.</b>  <input type="checkbox"/> CHECK IF BRANCH OFFICE	701 Enterprise Road East Suite 410 Safety Harbor, FL 34695	Project Management, Environmental Permitting, Drainage, Traffic, Design, QA/QC, Specifications
b.				<input type="checkbox"/> CHECK IF BRANCH OFFICE		
c.				<input type="checkbox"/> CHECK IF BRANCH OFFICE		
d.				<input type="checkbox"/> CHECK IF BRANCH OFFICE		
e.				<input type="checkbox"/> CHECK IF BRANCH OFFICE		
f.				<input type="checkbox"/> CHECK IF BRANCH OFFICE		

D. ORGANIZATIONAL CHART OF PROPOSED TEAM	[X] <i>(Attached)</i>
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# ORGANIZATIONAL CHART



X	A. Design Phase
X	B. Construction and Inspection Phase Services (Minor Projects Only)
X	C. Project Administration
X	D. General Civil/ Stormwater Engineering
X	E. Traffic Engineering
X	F. Water / Wastewater Engineering
X	G. Geotechnical Engineering
X	H. Pavement Management
X	I. Geographic Information Systems Services (GIS)
X	J. Grant Administration
X	K. General Engineering Consultation / Peer Review / Quality Assurance Review



**E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT**

*(Complete one Section E for each key person.)*

12. NAME <b>Bradley S. Foran, P.E.</b>	13. ROLE IN THIS CONTRACT <b>Project Manager</b>	14. YEARS EXPERIENCE	
		a. TOTAL 28	b. WITH CURRENT FIRM 17
15. FIRM NAME AND LOCATION <i>(City and State)</i> <b>Lighthouse Engineering, Inc. Safety Harbor, FL</b>			
16. EDUCATION <i>(DEGREE AND SPECIALIZATION)</i> B.S.C.E. / Civil Engineering		17. CURRENT PROFESSIONAL REGISTRATION <i>(STATE AND DISCIPLINE)</i> Professional Engineer: Florida, 1998, #52634	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i> FDOT Training / Contract Estimating System, Access Mgmt Guidelines for Project Development, Basic Lighting and Electricity, Advanced Work Zone Traffic Control Course, Specifications, Electronic Submittal			

**19. RELEVANT PROJECTS**

	(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION (If Applicable)
a.	Harbor Bay CDD – Apollo Beach, Florida	Ongoing	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE [X] Check if project performed with current firm EOR for the gen. engineering consultant for this CDD community which contains approximately 764 acres of mostly seaside properties which include town homes, villas, and single-family homes. The community has 27 retention ponds, recreational facilities, three amenity centers, multiple playgrounds, and parks; and the Mira Bay club which consists of a clubhouse, resort and lap pools, wading pools, grills and picnic area, sand volleyball court, boat docks and lifts, and a playground. Responsible for all the engineering needs of the community. This includes inspections, permitting, dock and lift applications, drainage reports and plans, community upkeep, Sewall inspections, traffic reports with regards to MUTCD standards, and correspondence with the residents.		
b.	FDOT District 7 - Sidewalk Gap at various location – Pinellas County	Ongoing	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE [X] Check if project performed with current firm Project Manager and EOR for this TWO that consists of sidewalk design along the East and Westside of S.R. 686 (Roosevelt Blvd.) – from Ulmerton Rd. to 16 <sup>th</sup> Street North, and sidewalk design along the Southside of S.R. 586 (Curlew Rd.) from Bayshore Blvd. to Cardinal Rd. This TWO also includes sidewalk design on the Southside of S.R. 694 (Park Blvd.) from 40 <sup>th</sup> Street North to U.S. 19.		
c.	FDOT District 7 – US 41 / SR 45/ S. 50 <sup>th</sup> St. from Denver St. to N. of 27 <sup>th</sup> Ave. S. – Hillsborough County	2023	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE [X] Check if project performed with current firm Project Manager and EOR for the design services for US 41 / SR 45/ S. 50 <sup>th</sup> St. from Denver St. to north of 27 <sup>th</sup> Ave. S. improvements. Project included milling and resurfacing, upgrading curb ramps to meet current ADA standards, and performing general safety modification work in order to extend the life of the existing pavement.		
d.	City of Pinellas Park – Curb Cuts – Various Locations	ongoing	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE [X] Check if project performed with current firm Project Manager and EOR for the removal of existing driveways at various locations along SR 694 (Park Blvd.) for the City of Pinellas Park. Driveway removal begins just east of 63 <sup>rd</sup> Street North and ends just east of 54 <sup>th</sup> Street North. Sod will be proposed at the existing driveway pavements that were removed, and sidewalk constructed to meet ADA Standards. A proposed curb will also be constructed where the existing driveways were removed. There are a total of 11 driveways being removed. Total project length is approximately 0.9 miles.		
e.	I-275 / SR 93 Bus on Shoulder from Alt US 19/SR595/5 <sup>th</sup> Ave N to SR 694/ Gandy Blvd. – Pinellas County FL *AWARD WINNING*	2019-2021	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE [X] Check if project performed with current firm Project Manager/EOR contracted to generate the Project System Engineering Plan (PSEMP) and the Requirement Traceability Verification Matrix (RTVM). Responsible for the installation of the RSS at the northbound and southbound ramps from 38 <sup>th</sup> Ave. N. and 54 <sup>th</sup> Ave. N. Also executed the removal and replacement of an ITS system components that are impacted by the Design-Build Firm's scope of work. Project also included paved shoulder widening, milling and resurfacing, drainage, signing and pavement markings, and lighting.		

**E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT**

*(Complete one Section E for each key person.)*

12. NAME <b>Thomas Liu, P.E.</b>	13. ROLE IN THIS CONTRACT <b>Project Engineering and Environmental Permitting</b>	11. YEARS EXPERIENCE <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:50%; text-align: center;">a. TOTAL 23</td> <td style="width:50%; text-align: center;">b. WITH CURRENT FIRM 12</td> </tr> </table>		a. TOTAL 23	b. WITH CURRENT FIRM 12
a. TOTAL 23	b. WITH CURRENT FIRM 12				
15. FIRM NAME AND LOCATION <i>(City and State)</i> <b>Lighthouse Engineering, Inc., Safety Harbor, FL</b>					
16. EDUCATION <i>(DEGREE AND SPECIALIZATION)</i> B.S.C.E./1994/Civil Engineering		17. CURRENT PROFESSIONAL REGISTRATION <i>(STATE AND DISCIPLINE)</i> Professional Engineer: Florida, 2000, #58258			
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i> FDOT Training: Project Management, Drainage, HY-8, AdICPR, HydroCAD, erosion control, Advanced Traffic Control, Specifications, Electronic Submittals					

**19. RELEVANT PROJECTS**

a.	(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION (If Applicable)
	<b>FDOT District 7 – Withlacoochee Trail from Hernando County Line to Marion County Line – Citrus County, FL</b>	2020	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <b>Project Engineer</b> responsible for roadway design, drainage analysis, signing and pavement marking, and Temporary Traffic Control Plans for this rehabilitation project. Also provided necessary documentation for the procurement and installation of the signalization and ITS system devices	[X] Check if project performed with current firm	
	<b>FDOT District 7 - Sidewalk Gap at various location – Pinellas County</b>	ongoing	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <b>Project Engineer</b> for this TWO that consists of sidewalk design along the East and Westside of S.R. 686 (Roosevelt Blvd.) – from Ulmerton Rd. to 16 <sup>th</sup> Street North, and sidewalk design along the Southside of S.R. 586 (Curlew Rd.) from Bayshore Blvd. to Cardinal Rd. This TWO also includes sidewalk design on the Southside of S.R. 694 (Park Blvd.) from 40 <sup>th</sup> Street North to U.S. 19.	[X] Check if project performed with current firm	
	<b>City of Pinellas Park – Curb Cuts – Various Locations</b>	ongoing	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <b>Project Engineer</b> for the removal of existing driveways at various locations along SR 694 (Park Blvd.) for the City of Pinellas Park. Driveway removal begins just east of 63 <sup>rd</sup> Street North and ends just east of 54 <sup>th</sup> Street North. Sod will be proposed at the existing driveway pavements that were removed, and sidewalk constructed to meet ADA Standards. A proposed curb will also be constructed where the existing driveways were removed. There are a total of 11 driveways being removed. Total project length is approximately 0.9 miles.	[X] Check if project performed with current firm	
	<b>US 41/ SR45/S. 50<sup>th</sup> St from Denver St. to N. of 27<sup>th</sup> Ave. S., Pinellas County, FL</b>	2021	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <b>Project Engineer</b> for the 3R project that includes milling and resurfacing, upgrading curb ramps to meet ADA standards, utility coordination, signing and pavement markings, signalization, traffic studies and lighting.	[X] Check if project performed with current firm	
	<b>I-275 / SR 93 Bus on Shoulder from Alt US 19/SR595/5<sup>th</sup> Ave N to SR 694/ Gandy Blvd. – Pinellas County FL *AWARD WINNING*</b>	2019-2021	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <b>Project Engineer</b> contracted to generate the Project System Engineering Plan (PSEMP) and the Requirement Traceability Verification Matrix (RTVM). Responsible for the installation of the RSS at the northbound and southbound ramps from 38 <sup>th</sup> Ave. N. and 54 <sup>th</sup> Ave. N. Also executed the removal and replacement of an ITS system components that are impacted by the Design-Build Firm's scope of work. Project also included paved shoulder widening, milling and resurfacing, drainage, signing and pavement markings, and lighting.	[X] Check if project performed with current firm	

**E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT**

*(Complete one Section E for each key person.)*

12. NAME <b>Frank. Foran, P.E.</b>	13. ROLE IN THIS CONTRACT <b>Project Manager</b>	14. YEARS EXPERIENCE	
		a. TOTAL 48	b. WITH CURRENT FIRM 17
15. FIRM NAME AND LOCATION <i>(City and State)</i> <b>Lighthouse Engineering, Inc. Safety Harbor, FL</b>			
16. EDUCATION <i>(DEGREE AND SPECIALIZATION)</i>  B.S.C.E. / Civil Engineering		17. CURRENT PROFESSIONAL REGISTRATION <i>(STATE AND DISCIPLINE)</i>  Professional Engineer: Florida, #11635	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i> Affiliations: Florida Engineering Society, American Society of Civil Engineers, American Society of Highway Engineers			

**19. RELEVANT PROJECTS**

	(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION (If Applicable)
a.	<b>FDOT District 7 – Withlacoochee Trail from Hernando County Line to Marion County Line – Citrus County, FL</b>	2020	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <b>QC Manager</b> responsible for roadway design, drainage analysis, signing and pavement marking, and Temporary Traffic Control Plans for this rehabilitation project. Also provided necessary documentation for the procurement and installation of the signalization and ITS system devices.	<input checked="" type="checkbox"/> Check if project performed with current firm	
b.	<b>City of Clearwater, FL – Bayshore Blvd – Urban Multi Use Trail</b>	2015	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <b>QC Manager</b> for the design of a new 10 foot wide multi-use path on the east side of the Bayshore Boulevard. Extensive permits were required with a full SWFWMD ERP and US Army Core of Engineering Nationwide #14 permits.	<input checked="" type="checkbox"/> Check if project performed with current firm	
c.	<b>Tampa Hillsborough Expressway Authority, Selmon Greenway – Tampa, FL</b>	2013	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <b>QC Manager</b> for design, permitting, construction and performing all other services necessary for a 15' on average (12' to 24' in some locations) multi-use trail to connect the City of Tampa's River Walk in the vicinity of Ashley Drive to the vicinity of 10 <sup>th</sup> Street.	<input checked="" type="checkbox"/> Check if project performed with current firm	
d.	<b>US 41/ SR45/S. 50<sup>th</sup> St from Denver St. to N. of 27<sup>th</sup> Ave. S., Pinellas County, FL</b>	2021	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <b>QC Manager</b> for the 3R project that includes milling and resurfacing, upgrading curb ramps to meet ADA standards, utility coordination, signing and pavement markings, signalization, traffic studies and lighting.	<input checked="" type="checkbox"/> Check if project performed with current firm	
e.	<b>City of Tampa General Engineering Services – Howard and Dekle Ave. Tampa, FL</b>	2020	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <b>QC Manager</b> for the redesign of an existing intersection that will accommodate the realignment of the intersection at Howard Ave and DeSoto/Dekle. The design included public involvement, utility relocation, roadway design, and signing and pavement markings.	<input checked="" type="checkbox"/> Check if project performed with current firm	

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER
21. TITLE AND LOCATION <i>(City and State)</i>		22. YEAR COMPLETED
Harbor Bay Community Development District, Apollo Beach FL		PROFESSIONAL SERVICES ongoing
		CONSTRUCTION <i>(if applicable)</i>
<b>23. PROJECT OWNER'S INFORMATION</b>		
a. PROJECT OWNER Harbor Bay Community Development District	b. POINT OF CONTACT NAME Jordan Lansford	c. POINT OF CONTACT TELEPHONE NUMBER 813-728-6062
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT <i>(Include scope, size, and cost)</i>		

The Harbor Bay Community Development District consists of approximately 764 acres of mostly seaside properties which include town homes, villas, and single family homes. The community has 27 detention ponds, recreational facilities, three amenity centers, multiple playgrounds and parks; and the Mira Bay club which consists of a clubhouse, resort and lap pools, wading pools, grills and picnic area, sand volleyball court, boat docks and lifts, and a playground. As the District Engineers we are responsible for all of the engineering needs of the community. This includes all inspections, permitting, dock and lift applications, drainage reports and plans, community upkeep, seawall inspections, traffic reports with regards to MUTCD standards, and correspondence with the residents. As the GEC for the CDD we routinely interact with the board and provide reports, evaluation, and financial guidance for current and future needs of the community.

<b>25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT</b>			
a.	(1) FIRM NAME Lighthouse Engineering, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Safety Harbor, FL	(3) ROLE Consultant
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 2
21. TITLE AND LOCATION <i>(City and State)</i> BayShore Boulevard – Urban Multi-Use Trail City of Clearwater, FL		22. YEAR COMPLETED PROFESSIONAL SERVICES 2015
		CONSTRUCTION <i>(If applicable)</i>

**23. PROJECT OWNER'S INFORMATION**

a. PROJECT OWNER City of Clearwater	b. POINT OF CONTACT NAME Leroy chin	c. POINT OF CONTACT TELEPHONE NUMBER 727-562-4856
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

The project scope was for the design of a new multi-use path along the east side of Bayshore Boulevard with boardwalk and asphalt path from the Ream Wilson Trail to SR 60. The project included the removal and replacement of the existing sidewalk within the project limits and provided a new 10 foot wide multi-use path. It also required drainage design necessary to reroute drainage flow into an existing inlet which was located in the area that is not desirable, to a modified or new inlet that did not impede the physical travel lane. It also required addressing the sidewalk profile to raise the existing profile of the sidewalk and ensure positive stormwater conveyance into the existing open drainage system.

LHE provided contract administration, design, drainage improvements, erosion control, drainage studies, permitting mitigation impacts, management services, utility coordination, construction engineering inspection services, and quality acceptance reviews of all work associated with the development and preparation of the contract plans and construction of the improvements. Project cost was 1 million dollars.



Before



After

**25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT**

a.	(1) FIRM NAME Lighthouse Engineering, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Safety Harbor, FL	(3) ROLE Consultant
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 3 Contract # E7R25
21. TITLE AND LOCATION <i>(City and State)</i> FDOT District 7 – Withlacoochee Trail from Hernando County Line to Marion County Line Citrus County - Florida		22. YEAR COMPLETED PROFESSIONAL SERVICES 2020 CONSTRUCTION <i>(If applicable)</i>
<b>23. PROJECT OWNER'S INFORMATION</b>		
a. PROJECT OWNER FDOT District 7	b. POINT OF CONTACT NAME Kevin Lee, P.E.	c. POINT OF CONTACT TELEPHONE NUMBER 813-975-6272
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT <i>(Include scope, size, and cost)</i>		

The Withlacoochee State Trail is a shared use path that connects Pasco, Hernando and Citrus Counties. This trail is 46 miles long. The improvements proposed consisted of rehabilitating segment of the Trail that were experiencing pavement failure. Parts of the existing trail were raised approximately 1.5 to 3 inches to above existing grade to minimize standing water. Signing and pavement markings along with the installation of Rectangular Rapid Flashing Beacon (RRFB) was installed for pedestrian safety at the trail crossing at CR 48 East Orange Avenue.

Responsible for the coordination of survey, geotechnical investigation, design, preparation of all documentation related to the acquisition of all permits not acquired by the Department, maintenance of traffic, demolition, and construction on or before the Project completion date, and utility relocations. Also responsible for the compliance with Design and Construction Criteria regarding survey, design, construction, and maintenance of traffic during construction, project management, scheduling, and coordination with other agencies and entities such as state and local government, utilities and public.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT			
a.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
	Lighthouse Engineering, Inc.	Safety Harbor, FL	Consultant
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 4 21717
21. TITLE AND LOCATION <i>(City and State)</i> US 41 / SR 45/ S. 50 <sup>th</sup> St. from Denver St to N. of 27 <sup>th</sup> Ave. S. Hillsborough, Florida		22. YEAR COMPLETED PROFESSIONAL SERVICES 2021 CONSTRUCTION <i>(If applicable)</i>
<b>23. PROJECT OWNER'S INFORMATION</b>		
a. PROJECT OWNER FDOT District 7	b. POINT OF CONTACT NAME Pla Cormier	c. POINT OF CONTACT TELEPHONE NUMBER 813-975-6176
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT <i>(Include scope, size, and cost)</i>		

US 41/SR 45/S. 50th St., from Denver St. to north of 27th Ave. S., is classified as an urban principal arterial on the State Highway System with a context classification designated as C3C -Suburban Commercial roadway. Cracking was identified throughout the existing roadway. To extend the life of the existing pavement, the proposal called for the milling and resurfacing of US 41 from Denver St. to north of 27<sup>th</sup> Ave. S. for a total project length of 1.100 miles. The project also included upgrading curb ramps to meet current ADA standards and perform general safety modification works. There was an existing railroad crossing at US 41 that required coordination through the District Rail Office.

Due to heavy truck traffic and narrow outside thru lane width of the roadway, the existing curb and gutter inlet tops were damaged. Structurally deficient drainage structures were evaluated for repair and/or replacement throughout the project limits.

LHE prepared contract documents including plans, specification, supporting engineering analysis, calculation and other technical documents.

**FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT**

a.	(1) FIRM NAME Lighthouse Engineering, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Safety Harbor, FL	(3) ROLE Prime Consultant
b.	(1) FIRM NAME Bala Consulting Services, LLC	(2) FIRM LOCATION <i>(City and State)</i> Tampa, FL	(3) ROLE Signing and pavement markings
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 5
21. TITLE AND LOCATION <i>(City and State)</i> <i>I - 275 / SR 93 Bus on Shoulder from ALT US 19 / SR 595 / 5<sup>th</sup> Ave N. to SR 694 / Gandy Blvd. Pinellas County, Florida</i>		22. YEAR COMPLETED PROFESSIONAL SERVICES 2020 CONSTRUCTION <i>(If applicable)</i>

**23. PROJECT OWNER'S INFORMATION**

a. PROJECT OWNER FDOT District 7	b. POINT OF CONTACT NAME Craig Fox, P.E.	c. POINT OF CONTACT TELEPHONE NUMBER 813-975-6082
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

I-275/SR93 (from Alt. US19/SR595/5th Ave. N. to SR694/Gandy Blvd.) is an Urban Principal Arterial Interstate. Located in Pinellas County, the project corridor is a northbound and southbound interstate with existing three (3) 12-foot travel lanes in each direction, 12 foot outside shoulder, and 8 foot (median) inside shoulder. The total project length was 5.203 miles.

Due to increasing public demand for transit ridership, the Department partnered with Pinellas Suncoast Transit Authority (PSTA) to implement the I-275 Bus on Shoulder Pilot Project which consisted of widening and resurfacing the northbound and southbound outside paved shoulder of I-275 (from Alt. US19/SR595/5th Ave. N. to SR694/Gandy Blvd.) from 10 feet to 12 feet. The shoulder widening will allow for transit vehicles to travel along the shoulder when traffic congestions slowed down the travel lanes to 35 mph. The existing three (3) 12-foot travel lanes were maintained along the northbound and southbound of I-275.

Project improvements consisted of shoulder milling/resurfacing, and shoulder widening. Existing drainage structures, pavement markings, signs, guardrail, lighting, and other features impacted by the project were replaced or relocated. Furthermore, side slopes affected by the shoulder widening were regraded and stabilized.

This was a roadway milling and resurfacing project which included pavement evaluation, mainline cross slope correction, and utility coordination. Signing and pavement marking design, specifications and cost estimating were also included. Project cost was 5 million dollars.



**FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT**

a.	(1) FIRM NAME Lighthouse Engineering, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Safety Harbor, FL	(3) ROLE Consultant
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 6
21. TITLE AND LOCATION <i>(City and State)</i> FDOT District 7 – SR 39 from County Line to Bay Ave. Pasco County - Florida		22. YEAR COMPLETED PROFESSIONAL SERVICES 2020 CONSTRUCTION <i>(If applicable)</i>
<b>23. PROJECT OWNER'S INFORMATION</b>		
a. PROJECT OWNER FDOT District 7	b. POINT OF CONTACT NAME Pia Cormier	c. POINT OF CONTACT TELEPHONE NUMBER 813-975-6176
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT <i>(Include scope, size, and cost)</i>		

The purpose of this RRR project was to preserve and extend the life of the existing pavement and perform general safety modification work. It included design of keyhole widening, cross slope correction, milling and resurfacing, signing and pavement markings, utility coordination, and permitting from SR 39 (Paul S. Buchman Hwy.) from Hillsborough County Line to South of Bay Ave. The segment of SR39 is classified as an urban principal arterial roadway with two typical sections. The first section consists of two lane undivided with 12' wide travel lanes, 8' wide shoulder (5' paved with bike lanes), and ditches on both sides. The second section is a two-lane divided with 12' wide travel lanes, 12' paved median, 8' shoulder (5' paved with bike lanes) and ditches on both sides. The project limit is from milepost 0.000 to milepost 0.679.

LHE provided drainage plans to accomplish the following goals:

- \*Identify existing drainage issues and provide the most cost-effective solutions.
- \*Enhance the safety level of the drainage structures
- \* Replace or repair structurally deficient drainage structures
- \*Ensure existing drainage features were not adversely impacted by the project
- \*Desilt all storm drain/side drain/cross drainpipes within the project limits.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT			
a.	(1) FIRM NAME Lighthouse Engineering, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Safety Harbor, FL	(3) ROLE Consultant
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 7
21. TITLE AND LOCATION <i>(City and State)</i>  City of Tampa – Himes and Azeele Signal Improvements Tampa, Florida	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES 2015	CONSTRUCTION <i>(If applicable)</i>

**23. PROJECT OWNER'S INFORMATION**

a. PROJECT OWNER City of Tampa	b. POINT OF CONTACT NAME Vik Bhide	c. POINT OF CONTACT TELEPHONE NUMBER 813-274-3101
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

The project scope was for the design of signal and ADA upgrades of the subject intersection. The project included new pedestrian countdown signals, sidewalk, roadway improvements, and mast arms. Additional elements included public involvement, utility relocation, signing and pavement marking, and all project management to complete the design.

Our scope of services included the following tasks:

- \* The design accommodated 4 legs of the intersection. Survey was required.
- \* Survey included all utilities above and below ground as well as all other above ground entities.
- \* Underground utilities were located via Subsurface Utility Engineering (SUE) in the vicinity of proposed pole foundation.
- \* Geotechnical services were required for mast arm pole.
- \* The limits of the project were milled and resurfaced to remove conflicting pavement markings.
- \* Himes was crowned to remove the "bump" both north and south of Azeele and to drain to the inlets in all four corners of the intersection.
- \* Data collection including traffic data and count information, sewer, water, storm sewer data, other planned projects in the vicinity, and all utilities
- \* Field Review and Analysis of project site conditions.
- \* Design Survey/SUE/Utility Coordination
- \* Design and Construction Plan Preparation
- \* Quality Assurance / Quality Review

Project cost was \$200,000.



Before



After

**FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT**

a.	(1) FIRM NAME Lighthouse Engineering, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Safety Harbor, FL	(3) ROLE Consultant
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 8 Contract #14-D-560
21. TITLE AND LOCATION <i>(City and State)</i> City of Tampa General Engineering Services – Palm Ave Tampa, Florida		22. YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION <i>(If applicable)</i>
<b>23. PROJECT OWNER'S INFORMATION</b>		
a. PROJECT OWNER City of Tampa	b. POINT OF CONTACT NAME Milton Martinez, P.E.	c. POINT OF CONTACT TELEPHONE NUMBER 813-274-8998
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT <i>(Include scope, size, and cost)</i>		

The project scope included upgrades to the ADA facilities along Palm Ave (between Nuccio and 19th Ave), add detectable warnings surfaces, and/or reconstruct ADA ramps with modifications to the median to allow pedestrians to cross at mid-block locations. Design also included RRFB's for pedestrian mid-block crossings along Palm Ave. at 17th and North 19. We also provided utility coordination and project management services necessary to complete the design.  
 Project Cost was \$100,000.



**FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT**

a.	(1) FIRM NAME Lighthouse Engineering, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Safety Harbor, FL	(3) ROLE Consultant
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 9
21. TITLE AND LOCATION <i>(City and State)</i>  City of Tampa General Engineering Services – Howard Ave at Dekle / DeSoto Ave. Tampa, Florida		22. YEAR COMPLETED PROFESSIONAL SERVICES 2020 CONSTRUCTION <i>(If applicable)</i>

23. PROJECT OWNER'S INFORMATION		
a. PROJECT OWNER City of Tampa	b. POINT OF CONTACT NAME Milton Martinez, P.E.	c. POINT OF CONTACT TELEPHONE NUMBER 813-274-8998
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT <i>(Include scope, size, and cost)</i>		

The project scope was for the redesign of the existing intersection that will accommodate the realignment of the intersection at Howard Ave. and DeSoto/Dekle Ave. The design included public involvement, utility relocation, roadway design, signing and pavement marking, and all project management to complete the design. Tasks to complete this project included the following:

- \*Update the design and concept plan to accommodate the additional parking spaces south on Dekle Ave. Additional meetings were required to gain the approval of the concept plan by the City and other design firms involved in the corridor study of the project area.
- \* Landscape and Irrigation plan for the green space between Dekle and De Soto.
- \* Obtained additional survey south on Dekle for the additional parking spaces.
- \* Provided utility coordination for the relocation of existing utilities within the project area as required as part of the new intersection configuration
- \* Provided a set of construction documents based on the concept plans.
- \* Provided construction phasing as part of the MOT

LHE provided utility coordination, design and construction plan preparation, pedestrian ramp/crosswalk design, design review, construction plans, quality assurance / quality review; as well as attended all field and coordination meetings. Project Cost was \$500,000.



Before



After

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT			
a.	(1) FIRM NAME Lighthouse Engineering, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Safety Harbor, FL	(3) ROLE Consultant
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 10
21. TITLE AND LOCATION <i>(City and State)</i> Meadow Pointe II Community Development District (CDD) General Engineering Consultant (GEC) – Wesley Chapel, Florida		22. YEAR COMPLETED PROFESSIONAL SERVICES 2021      CONSTRUCTION <i>(if applicable)</i>

**23. PROJECT OWNER'S INFORMATION**

a. PROJECT OWNER Meadow Pointe II CDD	b. POINT OF CONTACT NAME Bob Nanni	c. POINT OF CONTACT TELEPHONE NUMBER 813-991-1116 X105
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*  
 LHE was the general engineering consultant for this CDD community which contains 108 ponds, is home to almost 3500 residents and has almost 75 miles of roads. Over a 12-year period, LHE was tasked to produce pavement evaluations, pond evaluations and evaluations of all of the existing facilities that included the 2500 SF club house, pool, multipurpose courts and all of their existing wholly owned and operated infrastructure. LHE was also tasked with the tree removal and replanting within the communities. As the GEC for the CDD we routinely interacted with the board and provided reports, evaluation, and financial guidance for current and future needs of the community. We were engaged in the reissuance of bonds for the CDD that totaled more than ten million dollars and were intended to upgrade the existing infrastructure and produce monies for future expansion of the community facilities. As the GEC for the CDD we were responsible to the CDD for all its engineering needs.

The project consisted of the milling and resurfacing of the existing roadway within eleven sub-divisions of Meadow Point II CDD including the clubhouse. The communities included are listed below:

- |                 |                |
|-----------------|----------------|
| 1. Charlesworth | 7. Long leaf   |
| 2. Colehaven    | 8. Manor Isle  |
| 3. Covina Key   | 9. Sedgwick    |
| 4. Glenham      | 10. Vermillion |
| 5. Iverson      | 11. Wrencrest  |
| 6. Lettingwell  |                |

The scope included the following requirements:

1. Mobilization
2. Maintenance of traffic
3. Prevent asphalt and/or debris from entering existing inlets during construction
4. Mill existing asphalt pavement
5. Resurface the milled roadway with asphalt
6. Pavement restriping
7. Clean up site

**FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT**

a.	(1) FIRM NAME Lighthouse Engineering, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Safety Harbor, FL	(3) ROLE Consultant
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE



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

## ABILITY AND ADEQUACY OF PROFESSIONAL PERSONNEL

Lighthouse Engineering, Inc. (LHE) is pleased to submit this documentation for the KD52 Community Development District, Professional Services Continuing Contract. **It is our desire to save the KD52 CDD time and money by providing you with a concise summary of our qualifications and experience in this proposal. With over 30 years experience in the industry, our firm could produce hundreds of pages of documentation showing our vast knowledge and expertise, however we have chosen to give you a highlighted version to show our commitment to staying on task and preserving the CDD's funds.**

LHE and its team members have provided engineering services to the local Community Development Districts, City of Tampa, City of Clearwater, City of Safety Harbor, The Florida Department of Transportation Districts 1, 2, 3, 4, 6 and 7, and multiple private clients in the surrounding counties for over 18 years. Lighthouse Engineering, Inc. is a **Certified Statewide Small Business Enterprise (SBE) and Small Local Business Enterprise (SLBE)**. Our office is located in beautiful Safety Harbor, Florida. We are intimately familiar with the area. We are committed to the betterment of this community because we literally eat, sleep, work and play here.

LHE's Project Team of highly trained professionals consists of multi-disciplinary members with strengths in Transportation and Traffic Engineering, Drainage and Environmental Permitting services. Members of the LHE Project Team bring an exceptional level of experience and expertise to all areas mentioned above. Because we have chosen to remain a small firm, our overhead is low, which gives us the financial resources to successfully complete all projects on time and with the highest level of efficiency.

Over the past 17 years, LHE has advanced the concept of providing a total package of engineering services to public and private clients. We maintain a broad spectrum of expertise including our primary service areas:

- Roadway Transportation Design, Planning
- Permitting
- Site / Civil Engineering
- Traffic Engineering
- Signing and Pavement Marking Design
- Signalization Design
- Lighting

This diversity enables our organization to offer a unified "in-house" team approach consisting of highly skilled and experienced professionals in a variety of specialties. The result is high-quality consulting services provided in a professional and timely manner. The advantage to selecting LHE is that our engineers are diverse and multi-disciplined. This is a unique advantage as we can service a project with as few as three professionals and deliver the project to you. By keeping the project team small, compact, and efficient, LHE can service this contract and provide immense value to the KD52 Community Development District.

At Lighthouse Engineering, we have all of the training, experience, and expertise to successfully execute any job that the KD52 CDD may need to complete. Our staff is structured so that everyone fully comprehends and is more than competent in their role in the company. Our tiered approach allows us to provide the leadership, management and administrative

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needs for every different type of project. Although we are all capable of working together on every project, we also have specific areas that we specialize in to be most effective in our positions. We all take responsibility for every aspect of the project and work together to resolve conflict.

LHE has several professionals who have a great deal of experience in roadway design. Previous staff experience was obtained on City projects such as the intersection Improvement Project for Dale Mabry and Kennedy Blvd., Himes and Azele Signal upgrades, Palm Ave Improvements and Intersection Improvement Project for Fowler Avenue and 50th Street. In addition, our staff has extensive local experience in roadway, storm water and utility design projects for clients such as Hillsborough County, Pasco County, and The Florida Department of Transportation (FDOT); as well as many private clients including **Meadow Pointe II Community Development District (CDD), Harbor Bay Community Development District (CDD), Asturia Community Development District (CDD), Lakeside Plantation Community Development District (CDD), Parkview at Long Lake Ranch Community Development District (CDD) and most recently added; Summerstone Community Development District (CDD).**

**Mr. Brad Foran, P.E.**, will serve as Project Manager. Mr. Foran has over 30 years of experience in highway design, project coordination and management. His expertise includes urban/arterial type projects, major interstate design, pavement marking design, traffic control plans, and liaison with government agencies, contract negotiation, specifications, project schedules and reports, and quality control / assurance reviews. Mr. Foran has served as both manager and engineer of record for many projects within the Tampa Bay Area and has successfully completed hundreds of projects within the public and private sector. His level of experience and tremendous reputation in the community has allowed him to make and maintain contacts that will be beneficial to the CDD on this project. These skills/experiences allow Mr. Foran to complete all tasks effectively and on budget.

**Mr. Thomas Liu, P.E.**, will serve as the Assistant Project Manager. Mr. Liu's work experience highlights his knowledge of highway design, permitting, and hydraulic analysis of existing and proposed facilities. Mr. Liu is an expert stormwater management and drainage engineer. He served as a project engineer for Florida Department of Transportation design contracts for Districts 1, 2, 3, and 7 and has worked on numerous major and minor roadway restoration projects. He is a successful project manager for FDOT, Hillsborough County Public Works and various state and local agencies.

**Mr. Frank Foran, P.E.** is a Highway Design Engineer with more than 50 years of experience in the Tampa Bay Area. He will provide the direction for our Quality Control Program. Mr. Foran is certified with the Florida Department of Transportation (FDOT) in preparation of traffic control plans and has received training from the Department in cost estimating and long-range estimating systems. In addition to writing Quality Control Plans for various assignments at LHE, Mr. Foran performed quality assurance plan reviews for other consulting firms.

**Mrs. Amy Palmer** serves as the Operation Manager for LHE. She will oversee all administrative work, correspondence, billing and reporting. Amy has over 22 years of experience in Management with much of that in the engineering industry.

## **CONSULTANTS PAST PERFORMANCE**

Our vast experience with Community Development Districts demonstrates our ability to deliver creative solutions for all the community needs with amazing efficiency, which allows us to build in extra time to quickly and effectively solve any issues that may arise. LHE is committed to ensuring that every staff member affecting product quality is fully competent to perform their assigned tasks. All personnel assigned to production have recent experience in their respective areas of responsibility. Competency is established through education, training, experience, and demonstration of skills. Continuing education of our technical and professional staff is strongly encouraged. Many of our employees are enrolled in continuing

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education seminars and conferences offered by FDOT and other professional associations. Many of our engineers attend national seminars, where a variety of engineering trends and innovations are presented. Keeping up to date with the latest technology and management solutions allows us to provide more value to our clients. Our wide range of knowledge, experience, and innovative ideas can be seen in the following project experience.

Relevant Projects include:

### **Harbor Bay Community Development District**

The Harbor Bay Community Development District consists of approximately 764 acres of mostly seaside properties which include town homes, villas, and single-family homes. The community has 27 detention ponds, recreational facilities, three amenity centers, multiple playgrounds and parks; and the Mira Bay club which consists of a clubhouse, resort and lap pools, wading pools, grills and picnic area, sand volleyball court, boat docks and lifts, and a playground. As the District Engineers we are responsible for all the engineering needs of the community. This includes all inspections, permitting, dock and lift applications, drainage reports and plans, community upkeep, seawall inspections, traffic reports with regards to MUTCD standards, and correspondence with the residents. As the GEC for the CDD we routinely interact with the board and provide reports, evaluation, and financial guidance for current and future needs of the community.

### **Meadow Pointe II CDD**

LHE was the general engineering consultant for this CDD community which contains 108 ponds, is home to almost 3500 residents and has almost 75 miles of roads. Over a 12-year period, LHE was tasked to produce pavement evaluations, pond evaluations and evaluations of all of the existing facilities that included the 2500 SF club house, pool, multipurpose courts and all of their existing wholly owned and operated infrastructure. LHE was also tasked with the tree removal and replanting within the communities. As the GEC for the CDD we routinely interacted with the board and provided reports, evaluation, and financial guidance for current and future needs of the community. We were engaged in the reissuance of bonds for the CDD that totaled more than ten million dollars and were intended to upgrade the existing infrastructure and produce monies for future expansion of the community facilities. As the GEC for the CDD we were responsible to the CDD for all its engineering needs. The project consisted of the milling and resurfacing of the existing roadway within eleven subdivisions of Meadow Point II CDD including the clubhouse.

### **Lakeside Plantation Community Development District**

This CDD is located in North Port, Florida and boasts of 13 lakes, a 6,000 sq. foot clubhouse, pool and spa, and multiple amenities including basketball courts, playgrounds, tennis courts, pickleball and bocce ball courts. As District Engineers, we are responsible for all of the engineering needs for the community.

### **FDOT District 7 - Districtwide Sidewalk Gap Design Project**

This ongoing project includes the design of sidewalk improvements, including associated drainage and signing and marking. The goal is to eliminate sidewalk gaps along State Roadways. This will include:

- Evaluating known gaps to establish R/W and funding requirements.
  - Preparing and maintaining a funding plan / schedule for R/W and construction.
  - Preparing plans and specifications for letting as well as R/W instruments as required.
  - Revising or updating previously completed construction plans and documents, and providing Post Design Services, Construction Assistance Services and Expert Witness Testimony Services for assigned projects.
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## **FDOT - District 1 - SR 789 from Longboat Club Road to SR 64 Safety Improvements**

LHE was contracted as a sub for Ajax Paving for this Design Build project. This project consists of 17 different intersections for the design and construction of Rectangular Rapid Flashing Beacons (RRFBs), Pedestrian Hybrid Beacons (PHBs), sidewalk, and pedestrian lighting at cross walk locations. The re-design of these 17 intersections is intended to improve safety. We were required to accommodate several recreational resources, coordinate with multiple bus systems with routes and bus stops in the limits of the project, as well as replace all existing striping and raised pavement markers and install new signage and markings to accommodate the improvements. Several intersections required milling and resurfacing, sidewalk construction, and lighting design and installation.

## **FDOT District 1 - SR 25 (US 27) from N. of SR 540 to N. of Kokomo Rd.**

LHE was contracted as a sub for Burgess & Niple, Inc. for the design and construction of SR 25 from N. of SR 540 (Cypress Gardens Blvd.) to N. of Kokomo Rd (CR 546). Pavement resurfacing and widening depths were required, as well as stormwater treatment attenuation facilities were constructed. Signing, pavement marking, lighting and signalization plans were provided.

## **City of Tampa - Westshore Blvd. at Swann Ave and Beachway**

This project was to provide design services for the RRFB - Enhanced Crosswalks along Westshore Blvd. We provided utility coordination, construction documents based on concept plans and construction phasing as part of the MOT. We met with city officials to review the concept of work, any additional data and programming information, schedule, utility issues, City Design Standards, preferences and existing information. LHE met with property owners and coordinated with City Departments to develop and finalize concept plans.

## **FDOT District 7 - I-275 / SR 93 Bus on Shoulder *STATE AND NATIONAL AWARD WINNING PROJECT***

I-275 / SR 93 (from Alt. US 19 / SR 595 / 5th Ave. N. to SR 694 / Gandy Blvd.) is an Urban Principal Arterial Interstate. Located in Pinellas County, the project corridor is a northbound and southbound interstate with existing three (3) 23-foot travel lanes in each direction, 12 foot outside shoulder, and 8 foot (median) inside shoulder. The total project length was 5.203 miles. Due to increasing public demand for transit ridership, the Department partnered with Pinellas Suncoast Transit Authority (PSTA) to implement the I-275 Bus on Shoulder Pilot Project which consisted of widening and resurfacing the northbound and southbound outside paved shoulder of I-275 from 10 feet to 12 feet. The shoulder widening will allow transit vehicles to travel along the shoulder when traffic congestions slowed down the travel lanes to 35 mph. The existing three (3) 12- foot travel lanes were maintained along the northbound and southbound of I-275. Project improvements consisted of shoulder milling / resurfacing and shoulder widening. Existing drainage structures, pavement markings, signs, guardrail, lighting, and other features impacted by the project were replaced or relocated. Furthermore, side slopes affected by the shoulder widening were regraded and stabilized.

## **City of Clearwater - Bayshore Boulevard Urban Multi-Use Trail**

The project scope was for the design of a new multi-use path along the east side of Bayshore Boulevard with a boardwalk and asphalt path from the Ream Wilson Trail to SR 60. The project included the removal and replacement of the existing sidewalk within the project limits and provided a new 10-foot-wide multi-use path. It also required drainage design necessary to reroute the drainage flow into an existing inlet, which was located in the area that is not desirable, to a modified or new inlet that did not impede the physical travel lane. It also required addressing the sidewalk profile to raise

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the existing profile of the sidewalk to ensure positive stormwater conveyance into the existing open drainage system. LHE provided contract administration, design, drainage improvements, erosion control, drainage studies, permitting mitigation impacts, management services, utility coordination, construction engineering inspection services, and quality acceptance reviews of all work associated with the development and preparation of the contract plans and construction improvements.

#### **City of Pinellas Park - Curb Cuts - Various Locations**

This project scope included the removal of existing driveways at various locations along SR 694 (Park Blvd.) for the City of Pinellas Park. Sod was proposed at the existing driveway pavements that were removed, and sidewalk constructed to meet ADA standards. A proposed curb will also be constructed where the existing driveways were removed. There are a total of 11 driveways being removed. Total project length is approximately 0.9 miles.

#### **City of Tampa - General Engineering Services - Palm Ave.**

The project scope included upgrades to the ADA facilities along Palm Ave. (between Nuccio and 19th Ave.). We added detectable warnings surfaces and reconstructed ADA ramps with modification to the median to allow pedestrians to cross at mid-block locations. Design also included RRFB's for pedestrian mid-block crossings along Palm Ave. at 17th and North 19th Ave. We also provided utility coordination and project management services necessary to complete the design.

#### **City of Tampa - General Engineering Services - Howard Ave. at Dekle / DeSoto Ave.**

The project scope was for the redesign of the existing intersection that will accommodate the realignment of the intersection at Howard Ave. and DeSoto / Dekle Ave. The design included public involvement, utility relocation, roadway design, signing and pavement marking, and all project management to complete the design.

Tasks to complete this project included the following:

- Update the design and concept plan to accommodate the additional parking spaces south on Dekle Ave. Additional meetings were required to gain the approval of the concept plan by the City and other design firms involved in the corridor study of the project area.
- Landscape and Irrigation plan for the green space between Dekle and DeSoto.
- Obtained additional survey south on Dekle for additional parking spaces.
- Provided utility coordination for the relocation of existing utilities within the project area as required for the new intersection configuration
- Provided a set of construction documents based on the concept plans
- Provided construction phasing as part of the MOT

LHE provided utility coordination, design and construction plan preparation, pedestrian ramp/crosswalk design, design review, construction plans, quality assurance/quality review; as well as attended all field and coordination meetings.

#### **FDOT District 7 - US 41/ SR 45/ S. 50th St. from Denver St. to N. of 27th Ave. S.**

The purpose of this RRR project was to preserve and extend the life of the existing pavement through milling and resurfacing, upgrading to ADA curb ramps to meet current ADA standards, and performing general safety modification work.

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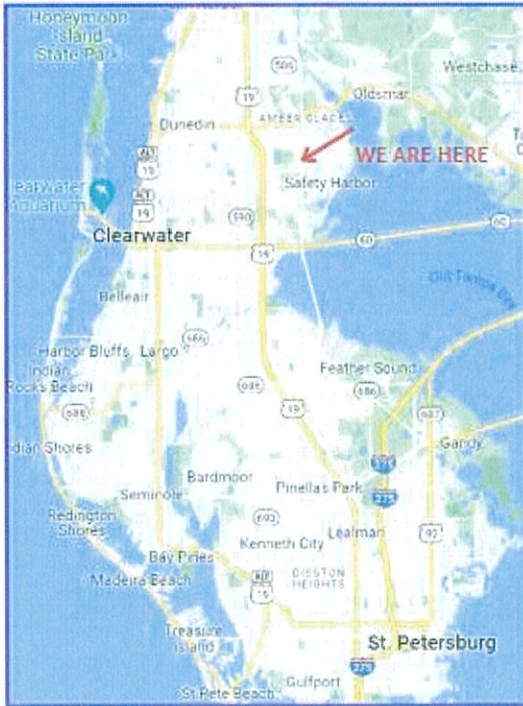
## GEOGRAPHIC LOCATION

Lighthouse Engineering is located in beautiful Safety Harbor, Florida. All our employees work out of our Safety Harbor office located at:

701 Enterprise Road East

Suite 410

Safety Harbor, FL 34695



## ABILITY TO MEET TIME AND BUDGET REQUIREMENTS

Our Chief Engineer, Brad Foran, has experience working with CDD's that spans over 20 years. He understands budget and time constraints that most District's face and is able to find engineering solutions that are practical and cost effective. He will be the lead engineer for all the needs of the community. Amy Palmer, our Operations Manager, has a vast amount of experience working with CDD's and will be the voice and contact person for our company. Her expertise saves the CDD money, as she is able to spearhead most projects at a lower hourly rate and then have them reviewed and assessed by the lead engineer.

We will take a fundamental approach to this project and will eliminate any steps that are not absolutely essential, saving the District money. Our goal is to be a seamless extension of the KD52 CDD and ensure that the CDD gets all the scope elements incorporated into every project. Communication will be done through a variety of means including but not limited to virtual meetings, email, phone calls and text messages. As mentioned earlier, Amy Palmer will be the point of contact for the CDD. All data will be recorded and stored in the design documentation (DD) and kept digitally for instant access by staff and team members. Project schedules will be continually updated to reflect current and projected progress. One of

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the single best ways to control costs is to adhere to the project schedule.

The permitting process is another way to get off schedule and budget. LHE has permitted numerous civil, and transportation projects and has a successful working relationship with many local permitting agencies. These local regulatory permitting agencies include the Florida Department of Environmental Protection (FDEP), FDOT, SWFWMD, and Pasco, Hillsborough, and Pinellas Counties. LHE recognizes the lengthy permitting schedule involved with many projects and applies a proactive approach to minimizing potential delays. This approach includes early and frequent meetings with regulatory agencies and constant coordination to minimize project disruption due to agency requests for additional information. Our staff has extensive experience preparing and tracking Environmental Resource Permits (ERPs) for both public and private clients.

LHE has been involved in the permitting process on many jobs for multiple municipalities and private clients. We understand how to apply for permits and what permits are needed for specific projects, as well as how to budget for permitting fees. We also have a great deal of knowledge as to what situations require a permit and those that do not. This allows us to save time researching if a permit is not needed, which ultimately save the CDD money. Our full-service and award-winning design staff understands the problems facing local government agencies such as escalating construction costs and shrinking budgets. We have the experience to provide our clients with cost effective engineering solutions that exceed the expectations of our clients and the public. LHE is experienced with the CDD's operations and has proudly served the surrounding area in a wide range of capacities for many years.

## **RECENT, CURRENT AND PROJECTED WORKLOAD**

The following information is provided to demonstrate specifically that the LHE team has the personnel and experience to best provide the requested services.

The current workload of LHE will allow us to begin work immediately. Our available design staff can provide more than 250 staff hours per month from our office in Safety Harbor. LHE routinely handles a multitude of projects involving various disciplines. We utilize subconsultants with experience in specialized areas such as SUE, land surveying and mapping, geotechnical engineering, and right of way acquisition, while employing our own engineers in other areas such as CEI, pavement evaluation, asset management, bridge inspection, and structure repairs. Our past and ongoing relationships provide us with a clear understanding of our subconsultants' abilities, which is a key element in effective coordination of project assignments. We set high standards for our subconsultants, and we ensure that they perform at high levels without impacts to the schedule.

We recently completed a number of significant projects including a Design-Build Project for FDOT District 1 at SR 789 from Longboat Club Road to SR 64. We are also scheduled to finish a Design-Build Project at SR 25 (US 27) in the next month. Currently we are working on a Sidewalk Gap Project for FDOT District 7 and a few smaller projects for private clients. We are in the process of finishing up the contract to begin work on TWO 10.2023 for the City of Pinellas Park. This project is for the plan preparation for the elimination of ten abandoned driveway aprons at various locations along Park Boulevard, including FDOT permitting.

Our projected workload falls within the capacity of our staff. As with any firm, our workload is not always constant but has peaks and valleys. The dedication of our staff enables LHE to meet our clients' goals by working overtime during peaks and improving our technical skills during slower periods. LHE and our entire team will pull together to ensure that we meet the CDD's needs.

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We are eager to utilize these resources in this important contract for the KD52 CDD. The personnel shown in the organizational chart are available for immediate assignment to the project.

**VOLUME OF WORK PREVIOUSLY AWARDED TO CONSULTANT**

Although we have not been awarded any work previously from the KD52 Community Development District, LHE has a vast amount of experience with other CDD's that allows us to anticipate all the needs of the District.

We are excited about the opportunity to lend our skills and experience to KD52 CDD.

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**I. AUTHORIZED REPRESENTATIVE**  
The foregoing is a statement of facts.

31. SIGNATURE



32. DATE

5/8/2025

33. NAME AND TITLE

Bradley S. Foran, P.E., President





# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
07/26/2024

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

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

<b>PRODUCER</b> Hiscox Inc. 5 Concourse Parkway Suite 2150 Atlanta GA, 30328	<b>CONTACT NAME:</b> PHONE (A/C, No, Ext): (888) 202-3007      FAX (A/C, No): E-MAIL ADDRESS: contact@hiscox.com	
	<b>INSURER(S) AFFORDING COVERAGE</b> NAIC #	
<b>INSURED</b> LIGHTHOUSE ENGINEERING 701 enterprise road east suite 410 safety harbor, FL 34695	<b>INSURER A:</b> Hiscox Insurance Company Inc      10200	
	<b>INSURER B:</b>	
	<b>INSURER C:</b>	
	<b>INSURER D:</b>	
	<b>INSURER E:</b>	
<b>INSURER F:</b>		

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

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED    RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below						<input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Professional Liability			P100.294.958.8	05/30/2024	05/30/2025	Each Claim: \$ 1,000,000 Aggregate: \$ 1,000,000

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

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

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**Florida Department of Transportation**

RON DESANTIS  
GOVERNOR

605 Suwannee Street  
Tallahassee, FL 32399-0450

JARED W. PERDUE, P.E.  
SECRETARY

October 23, 2024

Bradley Foran, President  
LIGHTHOUSE ENGINEERING INC. d/b/a LHE  
701 Enterprise Road East, Suite 410  
Safety Harbor, Florida 34695

Dear Mr. Foran:

The Florida Department of Transportation has reviewed your application for prequalification package and determined that the data submitted is adequate to technically prequalify your firm for the following professional services types of work per Rule 14-75, F.A.C.:

- 3.1 Minor Highway Design
- 3.2 Major Highway Design
- 3.3 Controlled Access Highway Design
  
- 6.3.1 Intelligent Transportation Systems Analysis and Design
- 6.3.2 Intelligent Transportation Systems Implementation
  
- 7.1 Signing, Pavement Marking and Channelization
- 7.2 Lighting
- 7.3 Signalization

Your firm is now technically prequalified with the Department for Professional Services in the above referenced work types. The overhead audit has been accepted, and your firm may pursue projects in the referenced work types with fees of any dollar amount. This status shall be valid until June 30, 2025, for contracting purposes.

Approved Rates

Home Overhead	Facilities Capital Cost of Money	Premium Overtime	Home Direct Expense
161.48%	6.944%	Reimbursed	0.00%

**Per Title 23, U.S. Code 112, there are restrictions on sharing indirect cost rates. Refer to Code for additional information.**

Should you have any questions, please feel free to contact me by email at carliayn.kell@dot.state.fl.us or by phone at 850-414-4597.

Sincerely,

Carliayn Kell  
Professional Services Qualification Administrator

## Licensee Details

### Licensee Information

Name: **LIGHTHOUSE ENGINEERING INC. DBA LHE, INC. (Primary Name)**

Main Address: **701 ENTERPRISE ROAD EAST  
SUITE 410  
SAFETY HARBOR Florida 34695**

County: **PINELLAS**

License Mailing:

LicenseLocation:

### License Information

License Type: **Registry**

Rank: **Registry**

License Number: **28576**

Status: **Current**

Licensure Date: **05/15/2009**

Expires:

<b>Special Qualifications</b>	<b>Qualification Effective</b>
-------------------------------	--------------------------------

### Alternate Names

[View Related License Information](#)

[View License Complaint](#)

.....  
**2601 Blair Stone Road, Tallahassee FL 32399** :: Email: **Customer Contact Center** :: Customer Contact Center: 850.487.1395

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Lighthouse Engineering Inc.

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[Events](#)   **No Name History**

## Detail by Entity Name

Florida Profit Corporation  
LIGHTHOUSE ENGINEERING INC.

### Filing Information

Document Number	P06000152907
FEI/EIN Number	20-8032896
Date Filed	12/12/2006
State	FL
Status	ACTIVE
Last Event	REINSTATEMENT
Event Date Filed	05/01/2009

### Principal Address

701 ENTERPRISE ROAD EAST  
SUITE 410  
SAFETY HARBOR, FL 34695

Changed: 03/31/2016

### Mailing Address

701 ENTERPRISE ROAD EAST  
SUITE 410  
SAFETY HARBOR, FL 34695

Changed: 03/31/2016

### Registered Agent Name & Address

FABRIZIO, SANDRA K, MRS.  
701 ENTERPRISE ROAD  
SUITE 410

SAFETY HARBOR, FL 34695

Name Changed: 03/07/2014

Address Changed: 03/07/2014

**Officer/Director Detail****Name & Address**

Title PTD

FORAN, BRADLEY S  
 65 TURNSTONE DR  
 SAFETY HARBOR, FL 34695

**Annual Reports**

Report Year	Filed Date
2020	01/22/2020
2021	03/08/2021
2022	03/08/2022

**Document Images**

<a href="#">03/08/2022 -- ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
<a href="#">03/08/2021 -- ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
<a href="#">01/22/2020 -- ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
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<a href="#">12/12/2006 -- Domestic Profit</a>	<a href="#">View image in PDF format</a>

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Lighthouse Engineering Inc.



### **Equal Business Opportunity (EBO)**

Certification Program

This is to certify that in accordance with City of Tampa Ordinance 2017-28, Chapter 26.5, Equal Business Opportunity Program

**Lighthouse Engineering, Inc. DBA LHE**

is hereby certified as a

**Small Local Business Enterprise (SLBE)**

In the following specialty(ies)

**Construction-Related Services**

The certification is valid from November 20, 2024 to January 15, 2027

---

Updates for recertification are required prior to the expiration date listed above. If at any time changes are made in the firm that are not in concert with our eligibility requirements, you agree to report those changes to us for evaluation. The City of Tampa reserves the right to terminate this certification at anytime it determines eligibility requirements are not being met.

Bertha M. Mitchell, Manager  
City of Tampa Equal Business Opportunity



**Board of County Commissioners  
Economic Development Department  
Minority and Disadvantaged Business Development**

## **Small Business Registration**

Lighthouse Engineering, Inc. DBA LHE

HC-1873/23

Valid from December 11, 2023 - March 2, 2026

**Approved Lines of Business:**

Engineering - Civil, Construction-Related Services

A handwritten signature in black ink, appearing to read "Theresa Kempa".

Theresa Kempa, Manager, MCA  
Minority & Small Business Enterprises Division



**PORT TAMPA BAY™**

***Small Business Enterprise Certification***

***Lighthouse Engineering Inc.***

*Federal ID #20-8032896*

*Services Provided: Architect-Engineer & Other Professional  
Design Services; Consulting Services*

*Valid from 04/25/2025 to 04/24/2026*

*Donna L. Casey*

---

*SBE & Contracts Manager*

*Please note this certificate is valid only with Port Tampa Bay.*

*It is not reciprocal with the City of Tampa or Hillsborough County and may not be reciprocal with any other local governmental agency.*

Member since 2022



## The City of St. Petersburg Small Business Enterprise (SBE)

*This certificate is awarded to*  
**Lighthouse Engineering, Inc. DBA LHE**

**Certification Number: 141280**

*This certificate is applicable in*

**NIGP 925: Engineering Services, Professional NIGP 92517: Civil Engineering, The City of St. Petersburg**

*Certified: April 3, 2025*

*Expires: April 3, 2028*

*Kourey Hendryx-Bell, J.D.*  
*Manager, Office of Supplier Diversity*  
*(727) 893-7226*  
[Kourey.Hendryx-Bell@stpete.org](mailto:Kourey.Hendryx-Bell@stpete.org)

In accordance with the City of St. Petersburg's Small Business Enterprise Ordinance #789-G, your business is certified as a Small Business Enterprise by the City of St. Petersburg. You will need to show proof of your new Occupational License each year, as well as renew your certification with this agency every three years. If at anytime the composition of the SBE status of your firm changes, you need to complete another SBE affidavit. The City of St. Petersburg Government reserves the right to terminate or cancel this certification at anytime when it is found that the composition of the Organization has changed and no longer meets the definition established for SBE certification.

**KD52**

**COMMUNITY DEVELOPMENT DISTRICT**

**No. 2**

**10D**

**KD52 Community Development District No. 1**  
**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
<i>weight factor</i>	<b>25</b>	<b>25</b>	<b>20</b>	<b>15</b>	<b>5</b>	<b>5</b>	<b>5</b>	<b>100</b>
	NAME OF RESPONDENT							
1	Alliant Engineering, Inc.							
2	Clearview Land Design, P.L.							
3	Lighthouse Engineering, Inc.							

\_\_\_\_\_  
 Board Member’s Signature

\_\_\_\_\_  
 Date

**KD52**

**COMMUNITY DEVELOPMENT DISTRICT**

**No. 2**

**11**

**RESOLUTION 2025-22**

**A RESOLUTION BY THE BOARD OF SUPERVISORS OF THE KD52 COMMUNITY DEVELOPMENT DISTRICT NO. 2 DESIGNATING THE LOCATION OF THE LOCAL DISTRICT RECORDS OFFICE AND PROVIDING AN EFFECTIVE DATE.**

**WHEREAS**, the KD52 Community Development District No. 2 (“District”) is a local unit of special-purpose government created and existing pursuant to Chapter 190, *Florida Statutes*, being situated within Pasco County, Florida; and

**WHEREAS**, the District is statutorily required to designate a local district records office location for the purposes of affording citizens the ability to access the District’s records, promoting the disclosure of matters undertaken by the District, and ensuring that the public is informed of the activities of the District in accordance with Chapter 119 and Section 190.006(7), *Florida Statutes*.

**NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE KD52 COMMUNITY DEVELOPMENT DISTRICT NO. 2:**

**SECTION 1.** The District’s local records office shall be located at:

**LOCATION:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**SECTION 2.** This Resolution shall take effect immediately upon adoption.

**PASSED AND ADOPTED** this \_\_\_\_\_ day of \_\_\_\_\_, 2025.

ATTEST:

**KD52 COMMUNITY DEVELOPMENT  
DISTRICT NO. 2**

\_\_\_\_\_  
Secretary/Assistant Secretary

\_\_\_\_\_  
Chair/Vice Chair, Board of Supervisors

**KD52**

**COMMUNITY DEVELOPMENT DISTRICT**

**No. 2**

**UNAUDITED  
FINANCIAL  
STATEMENTS**

**KD52**  
**COMMUNITY DEVELOPMENT DISTRICT NO. 2**  
**FINANCIAL STATEMENTS**  
**UNAUDITED**  
**AUGUST 31, 2025**

**KD52  
COMMUNITY DEVELOPMENT DISTRICT NO. 2  
BALANCE SHEET  
GOVERNMENTAL FUNDS  
AUGUST 31, 2025**

	General Fund	Total Governmental Funds
<b>ASSETS</b>		
Cash	\$ 10,618	\$ 10,618
Due from Landowner	6,831	6,831
Total assets	17,449	17,449
 <b>LIABILITIES AND FUND BALANCES</b>		
Liabilities:		
Accounts payable	\$ 7,469	\$ 7,469
Accrued taxes payable	31	31
Landowner advance	9,147	9,147
Total liabilities	16,647	16,647
 <b>DEFERRED INFLOWS OF RESOURCES</b>		
Deferred receipts	6,831	6,831
Total deferred inflows of resources	6,831	6,831
 Fund balances:		
Unassigned	(6,029)	(6,029)
Total fund balances	(6,029)	(6,029)
 Total liabilities, deferred inflows of resources and fund balances	 \$ 17,449	 \$ 17,449

**KD52  
COMMUNITY DEVELOPMENT DISTRICT NO. 2  
GENERAL FUND  
STATEMENT OF REVENUES, EXPENDITURES,  
AND CHANGES IN FUND BALANCES  
FOR THE PERIOD ENDED AUGUST 31, 2025**

	Current Month	Year to Date	Budget	% of Budget
<b>REVENUES</b>				
Landowner contribution	\$ 1,671	\$ 14,812	\$ 69,474	21%
Total revenues	<u>1,671</u>	<u>14,812</u>	<u>69,474</u>	21%
<b>EXPENDITURES</b>				
<b>Professional &amp; administrative</b>				
Supervisor	-	1,076	-	N/A
Management/accounting/recording**	2,000	12,000	20,000	60%
Legal	687	2,558	25,000	10%
Engineering	-	-	5,000	0%
Dissemination agent*	-	-	500	0%
Debt service fund accounting	-	-	1,250	0%
Telephone	16	100	117	85%
Postage	7	7	500	1%
Printing & binding	42	250	292	86%
Legal advertising	1,671	3,307	7,500	44%
Annual special district fee	-	-	175	0%
Insurance	-	-	5,500	0%
Meeting room rental	-	613	-	N/A
Contingencies/bank charges	168	930	1,750	53%
Website hosting & maintenance	-	-	1,680	0%
Website ADA compliance	-	-	210	0%
Total expenditures	<u>4,591</u>	<u>20,841</u>	<u>69,474</u>	30%
Excess/(deficiency) of revenues over/(under) expenditures	(2,920)	(6,029)	-	
Fund balances - beginning	(3,109)	-	-	
Fund balances - ending	<u>\$ (6,029)</u>	<u>\$ (6,029)</u>	<u>\$ -</u>	

\*These items will be realized when bonds are issued

**KD52**

**COMMUNITY DEVELOPMENT DISTRICT**

**No. 2**

**MINUTES**

**DRAFT**

**MINUTES OF MEETING  
KD52 COMMUNITY DEVELOPMENT DISTRICT NO. 2**

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The Board of Supervisors of the KD52 Community Development District No. 2 held a Special Meeting on July 8, 2025, at 1:00 p.m., at RAW Space Collaborative, 6013 Wesley Grove Blvd., Building 2, Suite 208, Wesley Chapel, Florida 33544.

**Present:**

Howard "Lane" Gardner	Chair
Taliaferro "Tolly" Krusen	Vice Chair
Matthew Josey	Assistant Secretary

**Also present:**

Cindy Cerbone	District Manager/Proxy Holder
Chris Conti	Wrathell, Hunt and Associates (WHA)
Jonathan Johnson (via telephone)	District Counsel
Brian Surak (via telephone)	District Engineer
Sean Manson (via telephone)	Landowner Representative
Misty Taylor (via telephone)	Bond Counsel
Sara Zare (via telephone)	MBS Capital Markets, LLC

**FIRST ORDER OF BUSINESS**

**Call to Order/Roll Call**

Ms. Cerbone called the meeting to order at 1:31 p.m.  
Supervisors Gardner, Krusen and Josey were present. Supervisor Loxton and Supervisor-Elect Laura Lindsey were absent.

**SECOND ORDER OF BUSINESS**

**Public Comments**

No members of the public spoke.

**THIRD ORDER OF BUSINESS**

**Administration of Oath of Office to Elected Supervisors Laura Lindsey [Seat 4] (the following will be provided in a separate package)**

40 This item will remain on the agenda until Ms. Lindsey is sworn in.

41 **A. Updates and Reminders: Ethics Training for Special District Supervisors and Form 1**

42 **B. Membership, Obligations and Responsibilities**

43 **C. Guide to Sunshine Amendment and Code of Ethics for Public Officers and Employees**

44 **D. Form 8B: Memorandum of Voting Conflict for County, Municipal and other Local**  
 45 **Public Officers**

46

47 **FOURTH ORDER OF BUSINESS**

**Consideration of Resolution 2025-41, Approving the Joinder to a Master Trust Indenture and First Supplemental Trust Indenture Relating to the Special Assessment Revenue Bonds, Series 2025 to be Issued by KD52 Community Development District No. 1; Approving the Form and Authorizing the Execution and Delivery of a Continuing Disclosure Agreement Between the District, Mulandco Liquidating Company, LLC and Wrathell, Hunt & Associates, LLC; Acknowledging Certain Actions to be Taken by the District in Connection With the Series 2025 Bonds; Providing for Miscellaneous Matters; Providing for Severability and Conflicts; and Providing an Effective Date**

66 Ms. Taylor stated that of the two “sister” Districts, KD52 CDD No. 1 will serve as the  
 67 issuer for the Series 2025 Bonds; however, KD52 CDD No. 2 will levy, collect and remit  
 68 assessments to CDD No. 1 pursuant to the Interlocal Agreement. There are certain covenants of  
 69 the CDD specifically in the event of non-payment of assessments to exercise remedies for  
 70 collection.

71 Ms. Taylor presented Resolution 2025-41, which accomplishes the following:

72 ➤ CDD No. 2 will join in the Master Trust Indenture and First Supplemental Trust Indenture  
 73 for purposes of the Series 2025 Bonds and will be obligated to adhere to the continuing  
 74 recording requirements under the Federal securities laws.

75 ➤ Acknowledges the issuance of the bonds.

- 76 ➤ Authorizes the joinder to the Indentures.
- 77 ➤ Authorizes the execution of the Continuing Disclosure Agreement and all other
- 78 documents attached to the Resolution in substantial form.
- 79 ➤ Authorizes the Chair, Vice Chair and others to execute the necessary documents needed
- 80 in order to close on the bonds.

81

82 **On MOTION by Mr. Gardner and seconded by Mr. Krusen, with all in favor,**  
 83 **Resolution 2025-41, , Approving the Joinder to a Master Trust Indenture and**  
 84 **First Supplemental Trust Indenture Relating to the Special Assessment Revenue**  
 85 **Bonds, Series 2025 to be Issued by KD52 Community Development District No.**  
 86 **1; Approving the Form and Authorizing the Execution and Delivery of a**  
 87 **Continuing Disclosure Agreement Between the District, Mulandco Liquidating**  
 88 **Company, LLC and Wrathell, Hunt & Associates, LLC; Acknowledging Certain**  
 89 **Actions to be Taken by the District in Connection With the Series 2025 Bonds;**  
 90 **Providing for Miscellaneous Matters; Providing for Severability and Conflicts;**  
 91 **and Providing an Effective Date, in substantial form, was adopted.**

92

93

**FIFTH ORDER OF BUSINESS**

**Consideration of Resolution 2025-22, Designating the Location of the Local District Records Office and Providing an Effective Date**

95

96

97

98

99

This item was deferred.

100

**SIXTH ORDER OF BUSINESS**

**Consideration of Resolution 2025-24, Designating Dates, Times and Locations for Regular Meetings of the Board of Supervisors of the District for Fiscal Year 2024/2025 and Providing for an Effective Date**

101

102

103

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108

Ms. Cerbone presented Resolution 2025-24. The Resolution will be amended to include the Fiscal Year 2024/2025 and Fiscal Year 2025/2026 Meeting Schedules.

110

The following change was made to Resolution 2025-24:

111

Title and where necessary: Insert "AND 2025/2026" after "2024/2025"

112

The following will be inserted into the Fiscal Year 2025 Meeting Schedule:

113 DATES & TIMES: August 12, 2025 at 9:00 AM; August 19, 2025 at 1:00 PM; August 25,  
114 2025 at 3:00 PM; and September 16, 2025 at 1:00 PM;

115 The following will be inserted into the Fiscal Year 2026 Meeting Schedule:

116 DATES: October 21, 2025; November 18, 2025; December 16,2025; January 20, 2026;  
117 February 17, 2026; March 17, 2026; April 21, 2026; May 19, 2026; June 16, 2026; July 21, 2026;  
118 August 18, 2026; and September 15, 2026.

119 TIME: 1:00 PM

120

121 **On MOTION by Mr. Krusen and seconded by Mr. Josey with all in favor,**  
122 **Resolution 2025-24, as amended, Designating Dates, Times and Locations for**  
123 **Regular Meetings of the Board of Supervisors of the District for Fiscal Years**  
124 **2024/2025 and 2025/2026, as amended, and Providing for an Effective Date,**  
125 **was adopted.**

126

127

128 **SEVENTH ORDER OF BUSINESS**

**Acceptance of Unaudited Financial  
Statements as of May 31, 2025**

129

130

131 **On MOTION by Mr. Krusen and seconded by Mr. Gardner, with all in favor, the**  
132 **Unaudited Financial Statements as of May 31, 2025, were accepted.**

133

134

135 **EIGHTH ORDER OF BUSINESS**

**Approval of Minutes**

136

137 **A. May 9, 2025 Special Meeting**

138 **B. May 15, 2024 Public Hearings and Regular Meeting**

139 **C. May 23, 2025 Landowners' Meeting**

140 This item was removed from consideration.

141 It was noted that Sean Manson attended via telephone.

142 **D. May 23, 2025 Continued Regular Meeting**

143 **On MOTION by Mr. Krusen and seconded by Mr. Josey, with all in favor, the**  
144 **May 9, 2025 Special Meeting Minutes; May 15, 2024 Public Hearings and**  
145 **Regular Meeting Minutes and the May 23, 2025 Continued Regular Meeting, all**  
146 **as presented, were approved.**

147

148

149 **NINTH ORDER OF BUSINESS** **Staff Reports**

150

151 **A. District Counsel: Kutak Rock LLP**

152 **B. District Engineer (Interim): Clearview Land Design, P.L.**

153 There were no District Counsel or District Engineer reports.

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

155 ○ **NEXT MEETING DATE: TBD**

156 ○ **QUORUM CHECK**

157 The next meeting will be on August 19, 2025, or sooner, if necessary for the bond issue.

158

159 **TENTH ORDER OF BUSINESS** **Board Members' Comments/Requests**

160

161 Mr. Gardner asked for calendar invites for future meetings to be sent to the Board.

162

163 **ELEVENTH ORDER OF BUSINESS** **Public Comments**

164

165 No members of the public spoke.

166

167 **TWELFTH ORDER OF BUSINESS** **Adjournment**

168

169 **On MOTION by Mr. Gardner and seconded by Mr. Krusen, with all in favor, the**  
170 **meeting adjourned at 11:38 a.m.**

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[SIGNATURES APPEAR ON THE FOLLOWING PAGE]

177  
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182

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Secretary/Assistant Secretary

---

Chair/Vice Chair

**KD52**

**COMMUNITY DEVELOPMENT DISTRICT**

**No. 2**

**STAFF  
REPORTS**

**KD52 COMMUNITY DEVELOPMENT DISTRICT NO. 1**

**BOARD OF SUPERVISORS FISCAL YEAR 2025/2026 MEETING SCHEDULE**

**LOCATION**

*RAW Space Collaborative*

*6013 Wesley Grove Blvd., Building 2, Suite 208, Wesley Chapel, Florida 33544*

<b>DATE</b>	<b>POTENTIAL DISCUSSION/FOCUS</b>	<b>TIME</b>
<b>October 21, 2025</b>	<b>Regular Meeting</b>	<b>1:00 PM</b>
<b>November 18, 2025</b>	<b>Regular Meeting</b>	<b>1:00 PM</b>
<b>December 16, 2025</b>	<b>Regular Meeting</b>	<b>1:00 PM</b>
<b>January 20, 2026</b>	<b>Regular Meeting</b>	<b>1:00 PM</b>
<b>February 17, 2026</b>	<b>Regular Meeting</b>	<b>1:00 PM</b>
<b>March 17, 2026</b>	<b>Regular Meeting</b>	<b>1:00 PM</b>
<b>April 21, 2026</b>	<b>Regular Meeting</b>	<b>1:00 PM</b>
<b>May 19, 2026</b>	<b>Regular Meeting</b>	<b>1:00 PM</b>
<b>June 16, 2026</b>	<b>Regular Meeting</b>	<b>1:00 PM</b>
<b>July 21, 2026</b>	<b>Regular Meeting</b>	<b>1:00 PM</b>
<b>August 18, 2026</b>	<b>Regular Meeting</b>	<b>1:00 PM</b>
<b>September 15, 2026</b>	<b>Regular Meeting</b>	<b>1:00 PM</b>