

LOUCKS ISLAND

**COMMUNITY DEVELOPMENT
DISTRICT**

April 9, 2026

**BOARD OF SUPERVISORS
SPECIAL MEETING AND
AUDIT COMMITTEE
MEETING AGENDA**

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT**

**AGENDA
LETTER**

Loucks Island Community Development District
OFFICE OF THE DISTRICT MANAGER
2300 Glades Road, Suite 410W•Boca Raton, Florida 33431
Phone: (561) 571-0010•Toll-free: (877) 276-0889•Fax: (561) 571-0013
<https://loucksislandcdd.net/>

April 1, 2026

Board of Supervisors
Loucks Island Community Development District

Dear Board Members:

The Board of Supervisors of the Loucks Island Community Development District will hold a Special Meeting and Audit Committee Meeting on April 9, 2026 at 12:30 p.m., at the City of Minneola City Hall, 800 N US Hwy 27, Minneola, Florida 34715. The agenda is as follows:

1. Call to Order/Roll Call
2. Public Comments
3. Acceptance of Resignation of Melanie Minihan [Seat 5]
4. Consideration of Appointment to Fill Unexpired Term of Seat 5; *Term Expires November 2027*
 - Administration of Oath of Office (*the following to be provided in a separate package*)
 - A. Required Ethics Training and Disclosure Filing
 - Sample Form 1 2023/Instructions
 - 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
5. Consideration of Resolution 2026-01, Electing and Removing Officers of the District and Providing for an Effective Date
6. Consideration of Resolution 2026-02, Approving a Proposed Budget for Fiscal Year 2026/2027 and Setting a Public Hearing Thereon Pursuant to Florida Law; Addressing Transmittal, Posting and Publication Requirements; Addressing Severability; and Providing an Effective Date

ATTENDEES:

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

7. Consideration of Resolution 2026-03, Designating Dates, Times and Locations for Regular Meetings of the Board of Supervisors of the District for Remainder of Fiscal Year 2025/2026 and Providing for an Effective Date
8. Consideration of Resolution 2026-04, Designating Dates, Times and Locations for Regular Meetings of the Board of Supervisors of the District for Fiscal Year 2026/2027 and Providing for an Effective Date
9. Consideration of Resolution 2026-05, Extending the Terms of Office of All Current Supervisors to Coincide with the General Election Pursuant to Section 190.006, *Florida Statutes*; Providing for Severability; and Providing an Effective Date
10. Recess Special Meeting/Commencement of Audit Selection Committee Meeting
11. Review of Responses to Request for Proposals (RFP) for Annual Audit Services
 - A. Affidavit of Publication
 - B. RFP Package
 - C. Respondent(s)
 - I. Berger, Toombs, Elam, Gaines & Frank
 - II. Grau & Associates
 - D. Auditor Evaluation Matrix/Ranking
12. Termination of Audit Selection Committee Meeting/Reconvene Special Meeting
13. Consider Recommendation of Audit Selection Committee
 - Award of Contract
14. Consideration of Response(s) to Request for Qualifications (RFQ) for Engineering Services
 - A. Affidavit of Publication
 - B. RFQ Package
 - C. Respondent(s)
 - I. Alliant Engineering, Inc.
 - II. Germana Engineering and Associates, LLC
 - D. Competitive Selection Criteria/Ranking
 - E. Award of Contract

- 15. Discussion/Consideration/Ratification: Performance Measures/Standards & Annual Reporting Form
 - A. October 1, 2024 - September 30, 2025 [Posted]
 - B. October 1, 2025 - September 30, 2026
- 16. Acceptance of Unaudited Financial Statements as of February 28, 2026
- 17. Approval of June 12, 2025 Public Hearings and Regular Meeting Minutes
- 18. Staff Reports
 - A. District Counsel: *Kutak Rock LLP*
 - B. District Engineer (Interim): *Germana Engineering and Associates, LLC*
 - C. District Manager: *Wrathell, Hunt and Associates, LLC*

- NEXT MEETING DATE: TBD
 - QUORUM CHECK

SEAT 1	ROB BONIN	<input type="checkbox"/> IN PERSON	<input type="checkbox"/> PHONE	<input type="checkbox"/> NO
SEAT 2	ROBERT HASSE	<input type="checkbox"/> IN PERSON	<input type="checkbox"/> PHONE	<input type="checkbox"/> NO
SEAT 3	LANE REGISTER	<input type="checkbox"/> IN PERSON	<input type="checkbox"/> PHONE	<input type="checkbox"/> NO
SEAT 4	MICHELLE DUDLEY	<input type="checkbox"/> IN PERSON	<input type="checkbox"/> PHONE	<input type="checkbox"/> NO
SEAT 5		<input type="checkbox"/> IN PERSON	<input type="checkbox"/> PHONE	<input type="checkbox"/> NO

- 19. Board Members' Comments/Requests
- 20. Public Comments
- 21. Adjournment

Should you have any questions or concerns, please do not hesitate to contact me or Raymond Passaro at (561) 571-0010.

Sincerely,



Daniel Rom
 District Manager

FOR BOARD MEMBERS AND STAFF TO ATTEND BY TELEPHONE
CALL-IN NUMBER: 1-888-354-0094
PARTICIPANT PASSCODE: 528 064 2804

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT**

4

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT**

5

RESOLUTION 2026-01

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE LOUCKS ISLAND COMMUNITY DEVELOPMENT DISTRICT ELECTING AND REMOVING OFFICERS OF THE DISTRICT AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the Loucks Island Community Development District (the “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 Officers of the District.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF LOUCKS ISLAND COMMUNITY DEVELOPMENT DISTRICT THAT:

SECTION 1. The following is/are elected as Officer(s) of the District effective April 9, 2026:

- _____ is elected Chair
- _____ is elected Vice Chair
- _____ is elected Assistant Secretary
- _____ is elected Assistant Secretary
- _____ is elected Assistant Secretary
- Raymond Passaro is elected Assistant Secretary

SECTION 2. The following Officer(s) shall be removed as Officer(s) as of April 9, 2026:

- Melanie Minihan Assistant Secretary
- Kristen Thomas Assistant Secretary

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

Craig Wrathell is Secretary

Daniel Rom is Assistant Secretary

Craig Wrathell is Treasurer

Jeff Pinder is Assistant Treasurer

PASSED AND ADOPTED THIS 9TH DAY OF APRIL, 2026.

ATTEST:

**LOUCKS ISLAND COMMUNITY
DEVELOPMENT DISTRICT**

Secretary/Assistant Secretary

Chair/Vice Chair, Board of Supervisors

LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT

6

RESOLUTION 2026-02
[FY 2027 BUDGET APPROVAL RESOLUTION]

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE LOUCKS ISLAND COMMUNITY DEVELOPMENT DISTRICT APPROVING A PROPOSED BUDGET FOR FISCAL YEAR 2026/2027 AND SETTING A PUBLIC HEARING THEREON PURSUANT TO FLORIDA LAW; ADDRESSING TRANSMITTAL, POSTING AND PUBLICATION REQUIREMENTS; ADDRESSING SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, for the fiscal year beginning October 1, 2026, and ending September 30, 2027 (“**FY 2027**”), the District Manager prepared and submitted to the Board of Supervisors (“**Board**”) of the Loucks Island Community Development District (“**District**”) prior to June 15, 2026, the proposed budget(s) attached hereto as **Exhibit A (“Proposed Budget”)**; and

WHEREAS, the Board now desires to set the required public hearing on the Proposed Budget.

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

1. PROPOSED BUDGET APPROVED. The Proposed Budget attached hereto as **Exhibit A** is hereby approved preliminarily.

2. SETTING A PUBLIC HEARING; DIRECTING PUBLICATION. A public hearing on said approved Proposed Budget is hereby declared and set for the following date, time, and location, and District staff is directed to provide notice of the same in accordance with Florida law:

DATE: _____, 2026
TIME: _____
LOCATION: _____

3. TRANSMITTAL TO LOCAL GENERAL PURPOSE GOVERNMENT; POSTING OF PROPOSED BUDGET. The District Manager is hereby directed to (i) submit a copy of the Proposed Budget to the applicable local general-purpose government(s) at least 60 days prior to its adoption, and (ii) post the approved Proposed Budget on the District’s website in accordance with Chapter 189, Florida Statutes.

4. SEVERABILITY; EFFECTIVE DATE. The invalidity or unenforceability of any one or more provisions of this Resolution shall not affect the validity or enforceability of the remaining portions of this Resolution, or any part thereof. This Resolution shall take effect immediately upon adoption.

PASSED AND ADOPTED THIS 9TH DAY OF APRIL, 2026.

ATTEST:

**LOUCKS ISLAND COMMUNITY
DEVELOPMENT DISTRICT**

Secretary/Assistant Secretary

Chair/Vice Chair, Board of Supervisors

Exhibit A: Proposed Budget

Exhibit A
FY 2027 Proposed Budget

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT
PROPOSED BUDGET
FISCAL YEAR 2027**

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT
TABLE OF CONTENTS**

<u>Description</u>	<u>Page Number(s)</u>
General Fund Budget	1
Definitions of General Fund Expenditures	2

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT
GENERAL FUND BUDGET
FISCAL YEAR 2027**

	Fiscal Year 2026				
	Adopted Budget FY 2026	Actual through 2/28/2026	Projected through 9/30/2026	Total Actual & Projected	Proposed Budget FY 2027
REVENUES					
Landowner contribution	\$ 94,090	\$ 18,460	\$ 28,383	\$ 46,843	\$ 312,090
Total revenues	<u>94,090</u>	<u>18,460</u>	<u>28,383</u>	<u>46,843</u>	<u>312,090</u>
EXPENDITURES					
Professional & administrative					
Supervisors	6,000	1,722	4,278	6,000	6,000
Management/accounting/recording**	48,000	10,000	14,000	24,000	48,000
Legal	25,000	-	5,000	5,000	25,000
Engineering	2,000	-	2,000	2,000	15,000
Audit*	-	-	-	-	4,500
Arbitrage rebate calculation*	-	-	-	-	500
Dissemination agent*	2,000	-	-	-	2,000
EMMA software service*	-	-	-	-	-
Trustee*	-	-	-	-	-
Telephone	200	84	116	200	200
Postage	500	-	500	500	500
Printing & binding	500	208	292	500	500
Legal advertising	1,500	368	1,132	1,500	1,500
Annual special district fee	175	175	-	175	175
Insurance	5,500	5,000	-	5,000	5,500
Meeting room rental	300	-	300	300	300
Contingencies/bank charges	1,500	811	689	1,500	1,500
Website hosting & maintenance	705	1,680	-	1,680	705
Website ADA compliance	210	145	65	210	210
Total professional & administrative	<u>94,090</u>	<u>20,193</u>	<u>28,372</u>	<u>48,565</u>	<u>112,090</u>
Field operations					
Miscellaneous	-	-	-	-	200,000
Total field operations	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>200,000</u>
Total expenditures	<u>94,090</u>	<u>20,193</u>	<u>28,372</u>	<u>48,565</u>	<u>312,090</u>
Excess/(deficiency) of revenues over/(under) expenditures	-	(1,733)	11	(1,722)	-
Fund balance - beginning (unaudited)	(38,290)	1,722	(11)	1,722	-
Fund balance - ending (projected)	-	-	-	-	-
Assigned	-	-	-	-	-
Working capital	-	-	-	-	-
Unassigned	(38,290)	(11)	-	-	-
Fund balance - ending	<u>\$ (38,290)</u>	<u>\$ (11)</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>

*These items will be realized when bonds are issued

**WHA will charge a reduced management fee of \$2,000 per month until bonds are issued.

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT
DEFINITIONS OF GENERAL FUND EXPENDITURES**

EXPENDITURES

Professional & administrative

Supervisors	\$ 6,000
Statutorily set at \$200 for each meeting of the Board of Supervisors not to exceed \$4,800 for each fiscal year.	
Management/accounting/recording**	48,000
Wrathell, Hunt and Associates, LLC (WHA), specializes in managing community development districts by combining the knowledge, skills and experience of a team of professionals to ensure compliance with all of the District's governmental requirements. WHA develops financing programs, administers the issuance of tax exempt bond financings, operates and maintains the assets of the community.	
Legal	25,000
General counsel and legal representation, which includes issues relating to public finance, public bidding, rulemaking, open meetings, public records, real property dedications, conveyances and contracts.	
Engineering	15,000
The District's Engineer will provide construction and consulting services, to assist the District in crafting sustainable solutions to address the long term interests of the community while recognizing the needs of government, the environment and maintenance of the District's facilities.	
Audit	4,500
Statutorily required for the District to undertake an independent examination of its books, records and accounting procedures.	
Arbitrage rebate calculation*	500
To ensure the District's compliance with all tax regulations, annual computations are necessary to calculate the arbitrage rebate liability.	
Dissemination agent*	2,000
The District must annually disseminate financial information in order to comply with the requirements of Rule 15c2-12 under the Securities Exchange Act of 1934. Wrathell, Hunt & Associates serves as dissemination agent.	
EMMA software service*	-
Trustee*	-
Telephone	200
Postage	500
Telephone and fax machine.	
Printing & binding	500
Mailing of agenda packages, overnight deliveries, correspondence, etc.	
Legal advertising	1,500
Letterhead, envelopes, copies, agenda packages	
Annual special district fee	175
The District advertises for monthly meetings, special meetings, public hearings, public bids, etc.	
Insurance	5,500
Annual fee paid to the Florida Department of Economic Opportunity.	
Meeting room rental	300
Contingencies/bank charges	1,500
Bank charges and other miscellaneous expenses incurred during the year and automated AP routing etc.	
Website hosting & maintenance	705
Website ADA compliance	210
Miscellaneous	200,000
Total expenditures	<u>\$ 312,090</u>

LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT

7

RESOLUTION 2026-03

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE LOUCKS ISLAND COMMUNITY DEVELOPMENT DISTRICT DESIGNATING DATES, TIMES AND LOCATIONS FOR REGULAR MEETINGS OF THE BOARD OF SUPERVISORS OF THE DISTRICT FOR REMAINDER OF FISCAL YEAR 2025/2026 AND PROVIDING FOR AN EFFECTIVE DATE

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

WHEREAS, the District is required by Section 189.015, *Florida Statutes*, to file quarterly, semi-annually, or annually a schedule (including date, time, and location) of its regular meetings with local governing authorities; and

WHEREAS, further, in accordance with the above-referenced statute, the District shall also publish quarterly, semi-annually, or annually the District’s regular meeting schedule in a newspaper of general paid circulation in the county in which the District is located.

WHEREAS, the Board desires to adopt the Fiscal Year 2025/2026 meeting schedule attached as **Exhibit A**.

NOW THEREFORE BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE LOUCKS ISLAND COMMUNITY DEVELOPMENT DISTRICT:

1. ADOPTING FISCAL YEAR 2025/2026 ANNUAL MEETING SCHEDULE. The Fiscal Year 2025/2026 annual meeting schedule attached hereto and incorporated by reference herein as **Exhibit A** is hereby approved and shall be published in accordance with the requirements of Florida law and also provided to applicable governing authorities.

2. EFFECTIVE DATE. This Resolution shall become effective immediately upon its adoption.

PASSED AND ADOPTED this 9th day of April, 2026.

ATTEST:

**LOUCKS ISLAND COMMUNITY
DEVELOPMENT DISTRICT**

Secretary/Assistant Secretary

Chair/Vice Chair, Board of Supervisors

EXHIBIT "A"

LOUCKS ISLAND COMMUNITY DEVELOPMENT DISTRICT		
BOARD OF SUPERVISORS FISCAL YEAR 2025/2026 MEETING SCHEDULE		
LOCATION		
<i>City of Minneola City Hall, 800 N US Highway 27, Minneola, Florida 34715</i>		
DATE	POTENTIAL DISCUSSION/FOCUS	TIME
May 14, 2026	Regular Meeting	12:30 PM
June 11, 2026	Regular Meeting	12:30 PM
July 9, 2026	Regular Meeting	12:30 PM
August 13, 2026	Regular Meeting	12:30 PM
September 10, 2026	Regular Meeting	12:30 PM

LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT

8

RESOLUTION 2026-04

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE LOUCKS ISLAND COMMUNITY DEVELOPMENT DISTRICT DESIGNATING DATES, TIMES AND LOCATIONS FOR REGULAR MEETINGS OF THE BOARD OF SUPERVISORS OF THE DISTRICT FOR FISCAL YEAR 2026/2027 AND PROVIDING FOR AN EFFECTIVE DATE

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

WHEREAS, the District is required by Section 189.015, *Florida Statutes*, to file quarterly, semi-annually, or annually a schedule (including date, time, and location) of its regular meetings with local governing authorities; and

WHEREAS, further, in accordance with the above-referenced statute, the District shall also publish quarterly, semi-annually, or annually the District’s regular meeting schedule in a newspaper of general paid circulation in the county in which the District is located.

WHEREAS, the Board desires to adopt the Fiscal Year 2026/2027 meeting schedule attached as **Exhibit A**.

NOW THEREFORE BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE LOUCKS ISLAND COMMUNITY DEVELOPMENT DISTRICT:

1. ADOPTING FISCAL YEAR 2026/2027 ANNUAL MEETING SCHEDULE. The Fiscal Year 2026/2027 annual meeting schedule attached hereto and incorporated by reference herein as **Exhibit A** is hereby approved and shall be published in accordance with the requirements of Florida law and also provided to applicable governing authorities.

2. EFFECTIVE DATE. This Resolution shall become effective immediately upon its adoption.

PASSED AND ADOPTED this 9th day of April, 2026.

ATTEST:

**LOUCKS ISLAND COMMUNITY
DEVELOPMENT DISTRICT**

Secretary/Assistant Secretary

Chair/Vice Chair, Board of Supervisors

EXHIBIT "A"

LOUCKS ISLAND COMMUNITY DEVELOPMENT DISTRICT		
BOARD OF SUPERVISORS FISCAL YEAR 2026/2027 MEETING SCHEDULE		
LOCATION		
<i>City of Minneola City Hall, 800 N US Highway 27, Minneola, Florida 34715</i>		
DATE	POTENTIAL DISCUSSION/FOCUS	TIME
October 8, 2026	Regular Meeting	12:30 PM
November 12, 2026	Regular Meeting	12:30 PM
December 10, 2026	Regular Meeting	12:30 PM
January 14, 2027	Regular Meeting	12:30 PM
February 11, 2027	Regular Meeting	12:30 PM
March 11, 2027	Regular Meeting	12:30 PM
April 8, 2027	Regular Meeting	12:30 PM
May 13, 2027	Regular Meeting	12:30 PM
June 10, 2027	Regular Meeting	12:30 PM
July 8, 2027	Regular Meeting	12:30 PM
August 12, 2027	Regular Meeting	12:30 PM
September 9, 2027	Regular Meeting	12:30 PM

LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT

9

RESOLUTION 2026-05

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE LOUCKS ISLAND COMMUNITY DEVELOPMENT DISTRICT EXTENDING THE TERMS OF OFFICE OF ALL CURRENT SUPERVISORS TO COINCIDE WITH THE GENERAL ELECTION PURSUANT TO SECTION 190.006, FLORIDA STATUTES; PROVIDING FOR SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the Loucks Island Community Development District (“District”) is a local unit of special purpose government created and existing pursuant to Chapter 190, *Florida Statutes*; and

WHEREAS, the current members of the Board of Supervisors (“Board”) were elected by the landowners within the District based on a one acre/one vote basis; and

WHEREAS, Chapter 190, *Florida Statutes*, authorizes the Board to adopt a resolution extending or reducing the terms of office of Board members to coincide with the general election in November; and

WHEREAS, the Board finds that it is in the best interests of the District to adopt this Resolution extending the terms of office of all current Supervisors of the District.

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

SECTION 1. The following terms of office are hereby extended to coincide with the general election to be held in November of 2028:

Seat # 3 (currently held by Lane Register)
Seat # 4 (currently held by Michelle Dudley)
Seat # 5 (currently vacant)

The following terms of office are hereby extended to coincide with the general election to be held in November of 2030:

Seat # 1 (currently held by Rob Bonin)
Seat # 2 (currently held by Robert Hasse)

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

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

PASSED AND ADOPTED this 9th day of April, 2026.

ATTEST:

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT**

Secretary/Assistant Secretary

Chair/ Vice Chair, Board of Supervisors

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT**

11

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT**

11A

The Villages
DAILY SUN

Published Daily
Lady Lake, Florida
State of Florida
County Of Lake

Before the undersigned authority personally appeared

ALLAN LOVELL

who on oath says that he is Legal Ad Coordinator of the DAILY SUN, a daily newspaper published at Lady Lake in Lake County, Florida with circulation in Lake, Sumter and Marion Counties; that the attached copy of advertisement, being a Legal Ad #1273744 in the matter of NOTICE OF REQUEST FOR PROPOSALS

was published in said newspaper in the issue(s) of
October 24, 2025

Affiant further says that the said Daily Sun is a newspaper published at Lady Lake in said Lake County, Florida, and that the said newspaper has heretofore been continuously published in said Lake County, Florida each week and has been entered as second class mail matter at the post office in Lady Lake, in said Lake County, Florida, for a period of one year next preceding the first publication of the attached copy of advertisements; and affiant further says that he has neither paid nor promised any person, firm, or Corporation any discount, rebate, commission or refund for the purpose of securing this advertisement for publication in the said newspaper.

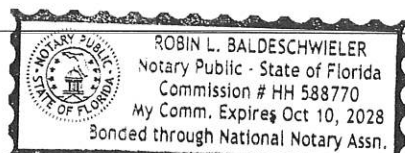


(Signature Of Affiant)

Sworn to and subscribed before me this 27
day October 2025.


Robin Baldeschwieler, Notary

Personally Known _____ or
Production Identification _____
Type of Identification Produced _____



Attach Notice Here

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT
DISTRICT REQUEST FOR
PROPOSALS FOR ANNUAL
AUDIT SERVICES**

The Loucks Island Community Development District hereby requests proposals for annual financial auditing services. The proposal must provide for the auditing of the District's financial records for the fiscal year ending September 30, 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 the City of Mascotte, Lake County, Florida. 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 offices of the District Manager, located at 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431; ph: (877) 276-0889 ("District Manager"), in an envelope marked on the outside "Auditing Services, Loucks Island Community Development District." Proposals must be received by 12:00 p.m. on November 3, 2025, at the office of the District Manager. Please direct all questions regarding this Notice to the District Manager.

District Manager

#01273744 October 24, 2025

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT**

11B

**LOUCKS ISLAND COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS FOR ANNUAL AUDIT SERVICES**

The Loucks Island Community Development District hereby requests proposals for annual financial auditing services. The proposal must provide for the auditing of the District's financial records for the fiscal year ending September 30, 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 the City of Mascotte, Lake County, Florida. 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 offices of the District Manager, located at 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431, ph: (877) 276-0889 ("District Manager"), in an envelope marked on the outside "Auditing Services, Loucks Island Community Development District." Proposals must be received by 12:00 p.m. on November 3, 2025, at the office of the District Manager. Please direct all questions regarding this Notice to the District Manager.

District Manager

LOUCKS ISLAND COMMUNITY DEVELOPMENT DISTRICT

REQUEST FOR PROPOSALS

District Auditing Services for Fiscal Year 2025

City of Mascotte, Lake County, Florida

INSTRUCTIONS TO PROPOSERS

SECTION 1. DUE DATE. Sealed proposals must be received no later than November 3, 2025 at 12:00 p.m., at the offices of District Manager, located at Wrathell, Hunt and Associates, LLC, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431. Proposals will be publicly opened at that time.

SECTION 2. FAMILIARITY WITH THE LAW. By submitting a proposal, the Proposer is assumed to be familiar with all federal, state, and local laws, ordinances, rules and regulations that in any manner affect the work. Ignorance on the part of the Proposer will in no way relieve it from responsibility to perform the work covered by the proposal in compliance with all such laws, ordinances and regulations.

SECTION 3. QUALIFICATIONS OF PROPOSER. The contract, if awarded, will only be awarded to a responsible Proposer who is qualified by experience and licensing to do the work specified herein. The Proposer shall submit with its proposal satisfactory evidence of experience in similar work and show that it is fully prepared to complete the work to the satisfaction of the District.

SECTION 4. SUBMISSION OF ONLY ONE PROPOSAL. Proposers shall be disqualified and their proposals rejected if the District has reason to believe that collusion may exist among the Proposers, the Proposer has defaulted on any previous contract or is in arrears on any previous or existing contract, or for failure to demonstrate proper licensure and business organization.

SECTION 5. SUBMISSION OF PROPOSAL. Submit one (1) electronic 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 – Loucks Island Community Development District" on the face of it. **Please include pricing for each additional bond issuance.**

SECTION 6. MODIFICATION AND WITHDRAWAL. Proposals may be modified or withdrawn by an appropriate document duly executed and delivered to the place where proposals are to be submitted at any time prior to the time and date the proposals are due. No proposal may be withdrawn after opening for a period of ninety (90) days.

SECTION 7. PROPOSAL DOCUMENTS. The proposal documents shall consist of the notice announcing the request for proposals, these instructions, the Evaluation Criteria Sheet and a proposal with all required documentation pursuant to Section 12 of these instructions (“**Proposal Documents**”).

SECTION 8. PROPOSAL. In making its proposal, each Proposer represents that it has read and understands the Proposal Documents and that the proposal is made in accordance therewith.

SECTION 9. BASIS OF AWARD/RIGHT TO REJECT. The District reserves the right to reject any and all proposals, make modifications to the work, and waive any informalities or irregularities in proposals as it is deemed in the best interests of the District.

SECTION 10. CONTRACT AWARD. Within fourteen (14) days of receipt of the Notice of Award from the District, the Proposer shall enter into and execute a Contract (engagement letter) with the District.

SECTION 11. LIMITATION OF LIABILITY. Nothing herein shall be construed as or constitute a waiver of the District’s limited waiver of liability contained in Section 768.28, *Florida Statutes*, or any other statute or law.

SECTION 12. MISCELLANEOUS. All proposals shall include the following information in addition to any other requirements of the proposal documents.

- A. List the position or title of all personnel to perform work on the District audit. Include resumes for each person listed; list years of experience in present position for each party listed and years of related experience.
- B. Describe proposed staffing levels, including resumes with applicable certifications.
- C. Three references from projects of similar size and scope. The Proposer should include information relating to the work it conducted for each reference as well as a name, address and phone number of a contact person.
- D. The lump sum cost of the provision of the services under the proposal, plus the lump sum cost of four (4) annual renewals.

SECTION 13. PROTESTS. In accordance with the District’s Rules of Procedure, any protest regarding the Proposal Documents, must be filed in writing, at the offices of the District Manager, within seventy-two (72) calendar hours (excluding Saturday, Sunday, and state holidays) after the receipt of the Proposal Documents. The formal protest setting forth with particularity the facts and law upon which the protest is based shall be

filed within seven (7) calendar days (including Saturday, Sunday, and state holidays) after the initial notice of protest was filed. Failure to timely file a notice of protest or failure to timely file a formal written protest shall constitute a waiver of any right to object or protest with respect to the aforesaid Proposal Documents.

SECTION 14. EVALUATION OF PROPOSALS. The criteria to be used in the evaluation of proposals are presented in the Evaluation Criteria Sheet, contained within the Proposal Documents.

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT**

11C

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT**

11CI

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT
PROPOSAL FOR AUDIT SERVICES**

PROPOSED BY:

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

600 Citrus Avenue, Suite 200
Fort Pierce, Florida 34950

(772) 461-6120

CONTACT PERSON:

Maritza Stonebraker, CPA, Director

DATE OF PROPOSAL:

November 3, 2025

TABLE OF CONTENTS

<u>DESCRIPTION OF SECTION</u>	<u>PAGE</u>
A. Letter of Transmittal	1-2
B. Profile of the Proposer	
Description and History of Audit Firm	3
Professional Staff Resources	4-5
Ability to Furnish the Required Services	5
A. Governmental Auditing Experience	6-15
B. Fee Schedule	16
C. Scope of Work to be Performed	16
D. Resumes	17-32
E. Peer Review Letter	33
Instructions to Proposers	34-35
Evaluation Criteria	36



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

November 3, 2025

Loucks Island Community Development District
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 Loucks Island Community Development District.

Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL has assembled a team of governmental and nonprofit specialists second to none to serve our clients. Our firm has the necessary qualifications and experience to serve as the independent auditors for Loucks Island Community Development District. We will provide you with top quality, responsive service.

Experience

Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL is a recognized leader in providing services to governmental and nonprofit agencies throughout Florida. We have been the independent auditors for a number of local governmental agencies and through our experience in performing their audits, we have been able to increase our audit efficiency and; therefore, reduce costs. We have continually passed this cost savings on to our clients and will continue to do so in the future. As a result of our experience and expertise, we have developed an effective and efficient audit approach designed to meet or exceed the performance specifications in accordance with auditing standards generally accepted in the United States of America, the standards applicable to financial audits contained in Government Auditing Standards, issued by the Comptroller General of the United States, and the standards for financial and compliance audits. We will conduct the audit in accordance with auditing standards generally accepted in the United States of America; "Government Auditing Standards" issued by the Comptroller General of the United States; the provisions of the Single Audit Act, Subpart F of Title 2 US Code of Federal Regulations (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, with minimal disruption to your operations. Our firm has frequent technical updates to keep our personnel informed and up-to-date on all changes that are occurring within the industry.

Loucks Island Community Development District
November 3, 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 Loucks Island Community Development District.

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)	2
Senior/Supervisor Accountants (1 CPA)	3
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.

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 Loucks Island Community Development District, including its elected officials and related parties, at the date of this proposal, as defined by the following rules, regulations, and standards:

AuSection 220 – Statements on Auditing Standards issued by the American Institute of Certified Public Accountants;

ET Sections 101 and 102 – Code of Professional Conduct of the American Institute of Certified Public Accountants;

Chapter 21A-1, Florida Administrative Code;

Section 473.315, Florida Statutes; and,

Government Auditing Standards, issued by the Comptroller General of the United States.

On an annual basis, all members of the firm are required to confirm, in writing, that they have no personal or financial relationships or holding that would impair their independence with regard to the firm's clients.

Independence is a hallmark of our profession. We encourage our staff to use professional judgment in situations where our independence could be impaired or the perception of a conflict of interest might exist. In the governmental sector, public perception is as important as professional standards. Therefore, the utmost care must be exercised by independent auditors in the performance of their duties.

Ability to Furnish the Required Services

As previously noted in the Profile of the Proposer section of this document, our firm has been in existence for over 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.

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 34 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

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

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

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 \$2,800 for the year ended September 30, 2025, and \$3,500 for the years ended September 30, 2026 and 2027. In addition, if a bond issuance occurs in the fiscal year ended September 30, 2025, there will be a fee of \$1,400 for each additional bond. The fee is contingent upon the financial records and accounting systems of Loucks Island Community Development District being "audit ready" and the financial activity for the District is not materially increased. If we discover that additional preparation work or subsidiary schedules are needed, we will consult with your authorized representative. We can assist with this additional work at our standard rates should you desire.

SCOPE OF WORK TO BE PERFORMED

If selected as the District's auditors, we will perform a financial and compliance audit in accordance with Section 11.45, Florida Statutes, in order to express an opinion on an annual basis on the financial statements of Loucks Island Community Development District as of September 30, 2025. The audits will be performed to the extent necessary to express an opinion on the fairness in all material respects with which the financial statements present the financial position, results of operations and changes in financial position in conformity with generally accepted accounting principles and to determine whether, for selected transactions, operations are properly conducted in accordance with legal and regulatory requirements. Reportable conditions that are also material weaknesses shall be identified as such in the Auditors' Report on Internal Control over Financial Reporting and on Compliance and Other Matters. Other (non-reportable) conditions discovered during the course of the audit will be reported in a separate letter to management, which will be referred to in the Auditors' Report on Internal Control over Financial Reporting and on Compliance and Other Matters.

Our audit will be performed in accordance with standards for financial and compliance audits contained in *Government Auditing Standards*, as well as in compliance with rules and regulations of audits of special districts as set forth by the State Auditor General in Chapter 10.550, Local Governmental Entity Audits, and other relevant federal, state and county orders, statutes, ordinances, charter, resolutions, bond covenants, Administrative Code and procedures, or rules and regulations which may pertain to the work required in the engagement.

The primary purpose of our audit will be to express an opinion on the financial statements discussed above. It should be noted that such audits are subject to the inherent risk that errors or irregularities may not be detected. However, if conditions are discovered which lead to the belief that material errors, defalcations or other irregularities may exist or if other circumstances are encountered that require extended services, we will promptly notify the appropriate individual.

Commitment to Quality Service

Personnel Qualifications and Experience

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
 - 19th Circuit Office of Medical Examiner
 - Troup Indiantown Water Control District
 - Exchange Club Center for the Prevention of Child Abuse, Inc.
 - Healthy Kids of St. Lucie County
 - Mustard Seed Ministries of Ft. Pierce, Inc.
 - Reaching Our Community Kids, Inc.
 - Reaching Our Community Kids - South
 - St. Lucie County Education Foundation, Inc.
 - Treasure Coast Food Bank, Inc.
 - North Springs Improvement District
- ◆ Four years of service in the United States Air Force in computer operations, with a top secret (SCI/SBI) security clearance.

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 – 12 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 – 10 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 – 12 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 – 14 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

Manager – 11 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

Personnel Qualifications and Experience
--

Tifanee Terrell, CPA

Senior Accountant – 5 years

Education

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

Professional Experience

- ◆ Senior 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 – 4 years

Education

- ◆ Indian River State College, B.S. – Accounting
- ◆ Florida Gulf Coast University, M.S. – Accounting

Professional Experience

- ◆ Senior 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.
- ◆ Mr. Dixon is currently studying to pass the CPA exam.

Commitment to Quality Service

Personnel Qualifications and Experience

Brennen Moore

Staff 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. 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.

Commitment to Quality Service

Personnel Qualifications and Experience

Deandre McFadden

Staff Accountant – 1 year

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

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. 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)



**LOUCKS ISLAND COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS**

DISTRICT AUDITING SERVICES FOR FISCAL YEAR 2025
City of Newberry, Alachua County, Florida

INSTRUCTIONS TO PROPOSERS

SECTION 1. DUE DATE. Sealed proposals must be received no later than November 3, 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 – Loucks Island Community Development District Community Development District" on the face of it. Please include pricing for each additional bond issuance.

SECTION 6. MODIFICATION AND WITHDRAWAL. Proposals may be modified or withdrawn by an appropriate document duly executed and delivered to the place where proposals are to be submitted at any time prior to the time and date the proposals are due. No proposal may be withdrawn after opening for a period of ninety (90) days.

SECTION 7. PROPOSAL DOCUMENTS. The proposal documents shall consist of the notice announcing the request for proposals, these instructions, the Evaluation Criteria Sheet and a proposal with all required documentation pursuant to Section 12 of these instructions (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.

**LOUCKS ISLAND COMMUNITY DEVELOPMENT DISTRICT
AUDITOR SELECTION
EVALUATION CRITERIA**

1. Ability of Personnel. (20 Points)

(E.g., geographic location of the firm’s headquarters or permanent office in relation to the project; capabilities and experience of key personnel; present ability to manage this project; evaluation of existing 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.

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT**

11CII



Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

Proposal to Provide Financial Auditing Services:

LOUCKS ISLAND

COMMUNITY DEVELOPMENT DISTRICT

Proposal Due: November 3, 2025
12:00PM

Submitted to:

Loucks Island
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

Fax (561) 994-5823

tgrau@graucpa.com

www.graucpa.com



Table of Contents

	PAGE
EXECUTIVE SUMMARY / TRANSMITTAL LETTER	1
FIRM QUALIFICATIONS.....	3
FIRM & STAFF EXPERIENCE.....	6
REFERENCES.....	11
SPECIFIC AUDIT APPROACH.....	13
COST OF SERVICES	17
SUPPLEMENTAL INFORMATION	19



Grau & Associates

CERTIFIED PUBLIC ACCOUNTANTS

November 3, 2025

Loucks Island 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 Loucks Island 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) or David Caplivski, CPA (dcaplivski@graucpa.com) at 561.994.9299. We thank you for considering our firm's qualifications and experience.

Very truly yours,
Grau & Associates



Antonio J. Grau

Firm Qualifications



Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

Grau's Focus and Experience

Our Team



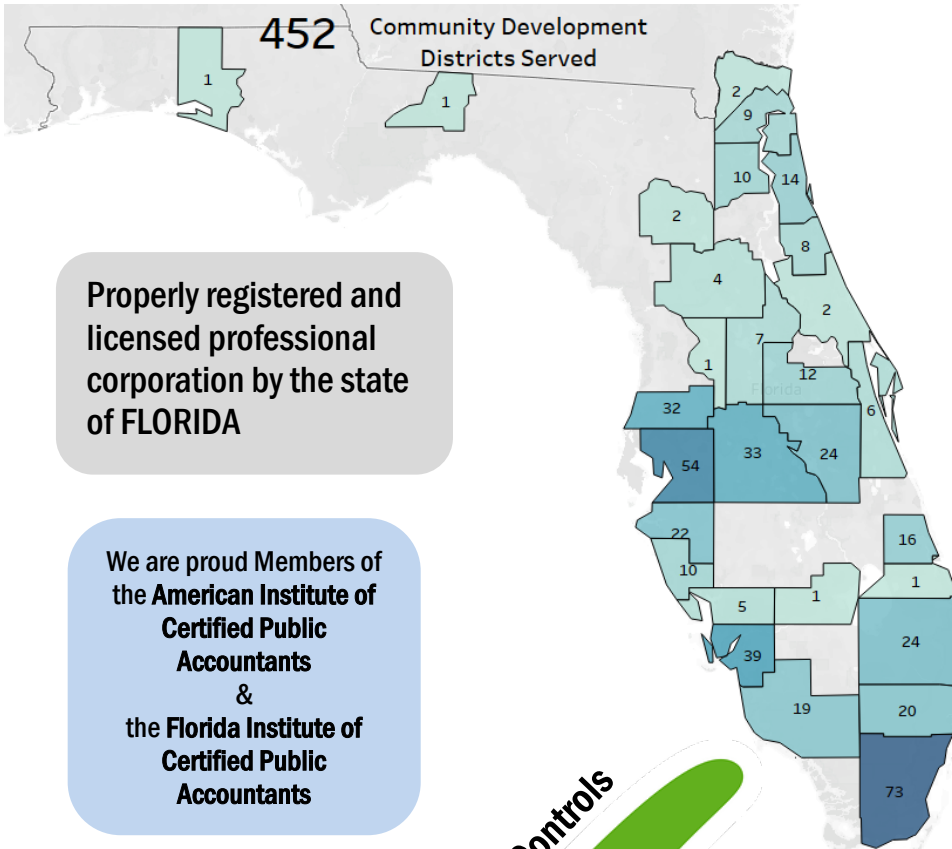
3 Partners
11 Professional Staff
2 Administrative Professionals



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**

Quality Controls



- ⇒ 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

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

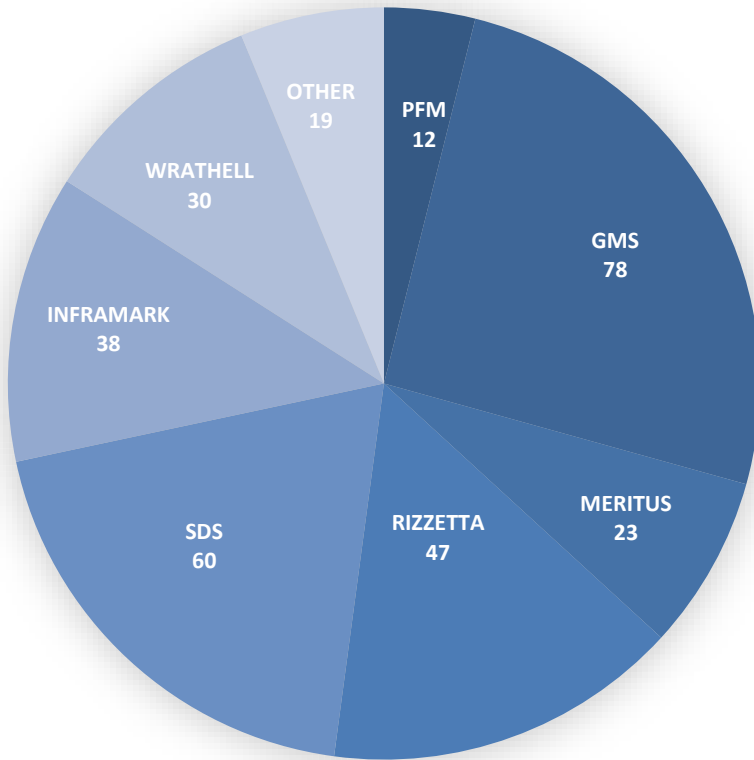
119 S Monroe Street, Suite 121 | Tallahassee, FL 32301 | 850.224.2727, in Florida | www.ficpa.org

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 | (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.

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	93 (includes of 4 hours of Ethics CPE)



David Caplivski, CPA/CITP, Partner
 Contact : 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

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

Two Creeks Community Development District

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

Journey's End Community Development District

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

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.

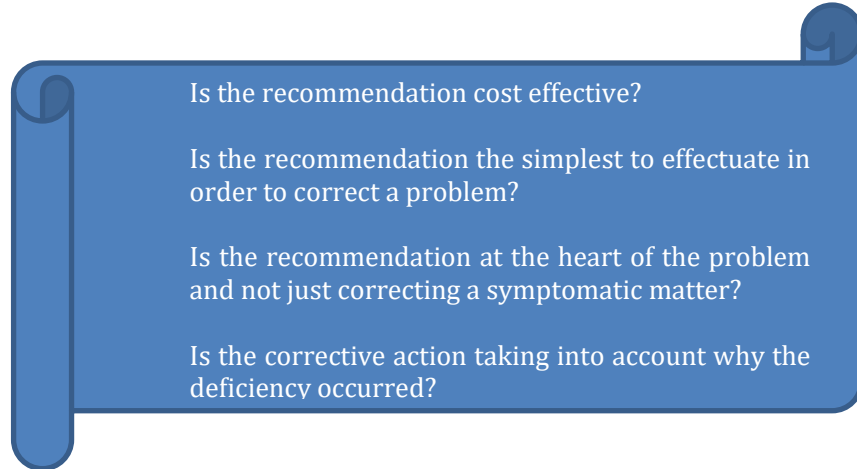
Application of this approach in developing our management letter is particularly important given the increasing financial pressures and public scrutiny facing today's public officials. We will prepare the management letter at the completion of our final procedures.

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:

Year Ended September 30,	Fee
2025	\$2,800
2026	\$2,900
2027	<u>\$3,000</u>
TOTAL (2025-2027)	<u>\$8,700</u>

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

SPECIAL DISTRICTS	Governmental Audit	Single Audit	Utility Audit	Current Client	Year End
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
TOTAL	491	5	4	484	

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 Loucks Island 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.**

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT**

11D

LOUCKS ISLAND COMMUNITY DEVELOPMENT DISTRICT

AUDITOR EVALUATION MATRIX

RFP FOR ANNUAL AUDIT SERVICES	ABILITY OF PERSONNEL	PROPOSER'S EXPERIENCE	UNDERSTANDING OF SCOPE OF WORK	ABILITY TO FURNISH REQUIRED SERVICES	PRICE	TOTAL POINTS
PROPOSER	20 POINTS	20 POINTS	20 POINTS	20 POINTS	20 POINTS	100 POINTS
Berger, Toombs, Elam, Gaines & Frank						
Grau & Associates						

NOTES:

Completed by: _____
Board Member's Signature

Date: _____

Printed Name of Board Member

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT**

14

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT**

14A

The Villages DAILY SUN

Published Daily
Lady Lake, Florida
State of Florida
County Of Lake

Before the undersigned authority personally appeared
ALLAN LOVELL

who on oath says that he is Legal Ad Coordinator of the DAILY SUN, a daily newspaper published at Lady Lake in Lake County, Florida with circulation in Lake, Sumter and Marion Counties; that the attached copy of advertisement, being a **Legal Ad #1273745** in the matter of **NOTICE OF REQUEST FOR QUALIFICATIONS**

was published in said newspaper in the issue(s) of
October 24, 2025

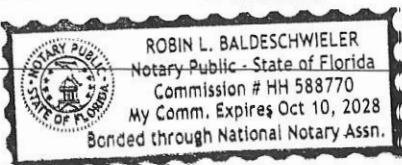
Affiant further says that the said Daily Sun is a newspaper published at Lady Lake in said Lake County, Florida, and that the said newspaper has heretofore been continuously published in said Lake County, Florida each week and has been entered as second class mail matter at the post office in Lady Lake, in said Lake County, Florida, for a period of one year next preceding the first publication of the attached copy of advertisements; and affiant further says that he has neither paid nor promised any person, firm, or Corporation any discount, rebate, commission or refund for the purpose of securing this advertisement for publication in the said newspaper.

(Signature Of Affiant)

Sworn to and subscribed before me this 27
day October 2025.

Robin Baldeschwieler, Notary

Personally Known _____ or
Production Identification _____
Type of Identification Produced _____



REQUEST FOR QUALIFICATIONS FOR ENGINEERING SERVICES FOR THE LOUCKS ISLAND COMMUNITY DEVELOPMENT DISTRICT

RFQ for Engineering Services

The Loucks Island Community Development District ("District"), located in the City of Mascotte, Lake County, Florida, announces that professional engineering services will be required on a continuing basis for the District's stormwater systems, and other public improvements authorized by Chapter 190, Florida Statutes. The engineering firm selected will act in the general capacity

of District Engineer and will provide District engineering services, as required.

Any firm or individual ("Applicant") desiring to provide professional services to the District must: 1) hold applicable federal, state and local licenses; 2) be authorized to do business in Florida in accordance with Florida law; and 3) furnish a statement ("Qualification Statement") of its qualifications and past experience on U.S. General Service Administration's "Architect-Engineer Qualifications, Standard Form No. 330," with pertinent supporting data. Among other things, Applicants must submit information relating to: a) the ability and adequacy of the Applicant's professional personnel; b) whether the Applicant is a certified minority business enterprise; c) the Applicant's willingness to meet time and budget requirements; d) the Applicant's past experience and performance, including but not limited to past experience as a District Engineer for any community development districts and past experience in the City of Mascotte, Lake 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) electronic and one (1) unbound copy of Standard Form No. 330 and the Qualification Statement by 12:00 p.m., on November 10, 2025 by email to gillyardd@whhassociates.com ("District Manager's Office").

The Board shall select and rank the Applicants using the requirements set forth in the CCNA and the evaluation criteria on file with the District Manager, and the highest ranked Applicant will be requested to enter into contract negotiations. If an agreement cannot be reached between the District and the highest ranked Applicant, negotiations will cease and begin with the next highest ranked Applicant, and if these negotiations are unsuccessful, will continue to the third highest ranked Applicant.

The District reserves the right to reject any and all Qualification Statements. Additionally, there is no express or implied obligation for the District to reimburse Applicants for any expenses

associated with the preparation and submittal of the Qualification Statements in response to this request.

Any protest regarding the terms of this Notice, or the evaluation criteria on file with the District Manager, must be filed in writing, within seventy-two (72) hours (excluding weekends) after the publication of this Notice. The formal protest setting forth with particularity the facts and law upon which the protest is based shall be filed within seven (7) calendar days after the initial notice of protest was filed. Failure to timely file a notice of protest or failure to timely file a formal written protest shall constitute a waiver of any right to object or protest with respect to aforesaid Notice or evaluation criteria provisions. Any person who files a notice of protest shall provide to the District, simultaneous with the filing of the notice, a protest bond with a responsible surety to be approved by the District and in the amount of Twenty Thousand Dollars (\$20,000.00).

#01273745 October 24, 2025

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT**

14B

**REQUEST FOR QUALIFICATIONS FOR ENGINEERING SERVICES
FOR THE LOUCKS ISLAND COMMUNITY DEVELOPMENT DISTRICT**

RFQ for Engineering Services

The Loucks Island Community Development District (“**District**”), located in the City of Mascotte, Lake County, Florida, announces that professional engineering services will be required on a continuing basis for the District’s stormwater systems, and other public improvements authorized by Chapter 190, *Florida Statutes*. The engineering firm selected will act in the general capacity of District Engineer and will provide District engineering services, as required.

Any firm or individual (“**Applicant**”) desiring to provide professional services to the District must: 1) hold applicable federal, state and local licenses; 2) be authorized to do business in Florida in accordance with Florida law; and 3) furnish a statement (“**Qualification Statement**”) of its qualifications and past experience on U.S. General Service Administration’s “Architect-Engineer Qualifications, Standard Form No. 330,” with pertinent supporting data. Among other things, Applicants must submit information relating to: a) the ability and adequacy of the Applicant’s professional personnel; b) whether the Applicant is a certified minority business enterprise; c) the Applicant’s willingness to meet time and budget requirements; d) the Applicant’s past experience and performance, including but not limited to past experience as a District Engineer for any community development districts and past experience in the City of Mascotte, Lake 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) electronic and one (1) unbound copy of Standard Form No. 330 and the Qualification Statement by 12:00 p.m., on November 10, 2025 by email to gillyardd@whhassociates.com (“**District Manager’s Office**”).

The Board shall select and rank the Applicants using the requirements set forth in the CCNA and the evaluation criteria on file with the District Manager, and the highest ranked Applicant will be requested to enter into contract negotiations. If an agreement cannot be reached between the District and the highest ranked Applicant, negotiations will cease and begin with the next highest ranked Applicant, and if these negotiations are unsuccessful, will continue to the third highest ranked Applicant.

The District reserves the right to reject any and all Qualification Statements. Additionally, there is no express or implied obligation for the District to reimburse Applicants for any expenses

associated with the preparation and submittal of the Qualification Statements in response to this request.

Any protest regarding the terms of this Notice, or the evaluation criteria on file with the District Manager, must be filed in writing, within seventy-two (72) hours (excluding weekends) after the publication of this Notice. The formal protest setting forth with particularity the facts and law upon which the protest is based shall be filed within seven (7) calendar days after the initial notice of protest was filed. Failure to timely file a notice of protest or failure to timely file a formal written protest shall constitute a waiver of any right to object or protest with respect to aforesaid Notice or evaluation criteria provisions. Any person who files a notice of protest shall provide to the District, simultaneous with the filing of the notice, a protest bond with a responsible surety to be approved by the District and in the amount of Twenty Thousand Dollars (\$20,000.00).

LOUCKS ISLAND COMMUNITY DEVELOPMENT DISTRICT

DISTRICT ENGINEER PROPOSALS

COMPETITIVE SELECTION CRITERIA

1) Ability and Adequacy of Professional Personnel (Weight: 25 Points)

Consider the capabilities and experience of key personnel within the firm including certification, training, and education; affiliations and memberships with professional organizations; etc.

2) Consultant's Past Performance (Weight: 25 Points)

Past performance for other Community Development Districts in other contracts; amount of experience on similar projects; character, integrity, reputation, of respondent; etc.

3) Geographic Location (Weight: 20 Points)

Consider the geographic location of the firm's headquarters, offices and personnel in relation to the project.

4) Willingness to Meet Time and Budget Requirements (Weight: 15 Points)

Consider the consultant's ability and desire to meet time and budget requirements including rates, staffing levels and past performance on previous projects; etc.

5) Certified Minority Business Enterprise (Weight: 5 Points)

Consider whether the firm is a Certified Minority Business Enterprise. Award either all eligible points or none.

6) Recent, Current and Projected Workloads (Weight: 5 Points)

Consider the recent, current and projected workloads of the firm.

7) Volume of Work Previously Awarded to Consultant by District (Weight: 5 Points)

Consider the desire to diversify the firms that receive work from the District; etc.

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT**

14C

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT**

14CI



ALLIANT

THE LOUCKS ISLAND COMMUNITY DEVELOPMENT DISTRICT

REQUEST FOR QUALIFICATIONS
FOR ENGINEERING SERVICES

November 10, 2025

SUBMITTED TO:

The Loucks Island Community Development District

Ms. Daphne Gillyard, District Manager's Office
Wrathell, Hunt and Associates
2300 Glades Road, Suite 410W
Boca Raton, Florida 33431

Via Email: gillyardd@whhasociates.com

SUBMITTED BY:

Alliant Engineering, inc.

3901 Coconut Palm Drive, Suite 102
Tampa, Florida 33619

813.954.4337



Building better communities with excellent and passion.

Dear Ms. Daphne Gillyard and Members of the Evaluation Committee:

Alliant Engineering Inc. (Alliant) is a highly experienced local firm that is perfectly suited to provide professional engineering services to **The Loucks Island Community Development District**. Our Senior Civil Engineer, David R. Landing, PE, 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 professional and support staff. Serving clients like **The Loucks Island 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 Loucks Island 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 David'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 over 28 years of diverse experience in both design and construction across a broad range of civil infrastructure projects. His areas of expertise include land development, water resources, municipal water systems, sanitary sewer design and rehabilitation, stormwater management, and roadway design and construction. He's served as both a Client Manager and Design Engineer on numerous similar projects, combining technical knowledge with hands-on leadership.

DEDICATED CORE TEAM. 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 to and available to serve the district.

We're pleased to have the opportunity to support **The Loucks Island Community Development District** with ongoing professional engineering services. If you have any questions or need additional information, please don't hesitate to reach out.

Thank you for considering our qualifications.

Sincerely,
Alliant Engineering, Inc.



David R. Landing, PE, Client Manager

☎ 904.513.3218 ✉ dlanding@alliant-inc.com



Andrew Mansen, PE, Project Manager

☎ 904.329.4001 ✉ amansen@alliant-inc.com

Table of Contents

1. Architect-Engineer Qualifications

Table of Contents	1-2
Contract Specific Qualifications, Point of Contact, & Proposed Team	3

2. Exhibit 1 – Organizational Chart.....4

3. Resumes of Key Personnel

David R. Landing, PE.....	5
Andrew Mansen, PE.....	6
Joseph Schofield, PE.....	7
Adam Oestman, PE,.....	8
Curtis Wimpée, PE.....	9
Ashley Rivera.....	10
Clayton Walley, LS.....	11
Joe Brinson, PWS.....	12
Brett Harbison, PE.	13

4. Example Projects

Anabelle Island, Green Cove Springs, FL.....	14
Beachview Cove, Ormond Beach, FL	15
Wildlight Community, Nassau County, FL.....	16
AdventHealth, Palm Coast, FL.....	17
Hillsborough County Emergency Vehicle Preemption, Tampa Bay, FL	18
Saddlebrook Landings Apartment Community, Jacksonville, FL.....	19
Whiteview Subdivision, Palm Coast, FL	20
Tallahassee Memorial Healthcare Campus Expansion to Panama City Beach, FL	21
Riverfront Plaza, Jacksonville, FL.....	22
Reverie at Palm Coast Subdivision, Palm Coast, FL.....	23
Sweetgrass Apartments, Phase 1 Enhanced Landscape, St. Mary's, GA	24
Trout Creek Community Development District, St. Johns County, FL.....	25
Sawmill Branch Roundabout, Palm Coast, FL	26
Shadow Crest at Rolling Hills CDD, Phases 3B & 3C, Green Cove Springs, FL	27

5. Key Personnel Participation in Example Projects	28
6. Additional Information	
Project Team Bios.....	29-31
Firm Licensure and Prequalification's.....	32
Community Development District Experience	33
Comprehensive Expertise and Proven Commitment.....	34
Public and Private Sectors	35
Recent, Current, and Projected Workloads	36
7. General Qualifications	
Alliant Engineering, Inc.....	37
Meskel & Associates Engineering, PLLC	38
ECS Florida, LLC	39
8. Appendices – Certifications, Licenses, and Location Map	
Appendix A Coversheet.....	40
Women Business Certification	41
Licenses	42
Location Map	43

LIST OF EXHIBITS

Exhibit 1 – Organizational Chart	4
Exhibit 2 – Projected Schedule.....	36
Exhibit 3 - Location Map	44

ARCHITECT-ENGINEER QUALIFICATIONS

PART I - CONTRACT-SPECIFIC QUALIFICATIONS

A. CONTRACT INFORMATION

Response to Request for Qualifications for The Loucks Island Community Development District, Mascotte, Florida

1. TITLE AND LOCATION <i>(City and State)</i>		01273745
October 24, 2025		
2. PUBLIC NOTICE DATE	3. SOLICITATION OR PROJECT NUMBER	

B. ARCHITECT-ENGINEER POINT OF CONTACT

1. NAME AND TITLE		
David R. Landing, PE Client Manager		
2. NAME OF FIRM		
Alliant Engineering, Inc.		
6. TELEPHONE NUMBER	7. FAX NUMBER	8. E-MAIL ADDRESS
(904) 513-3218		dlanding@alliant-inc.com

C. PROPOSED TEAM

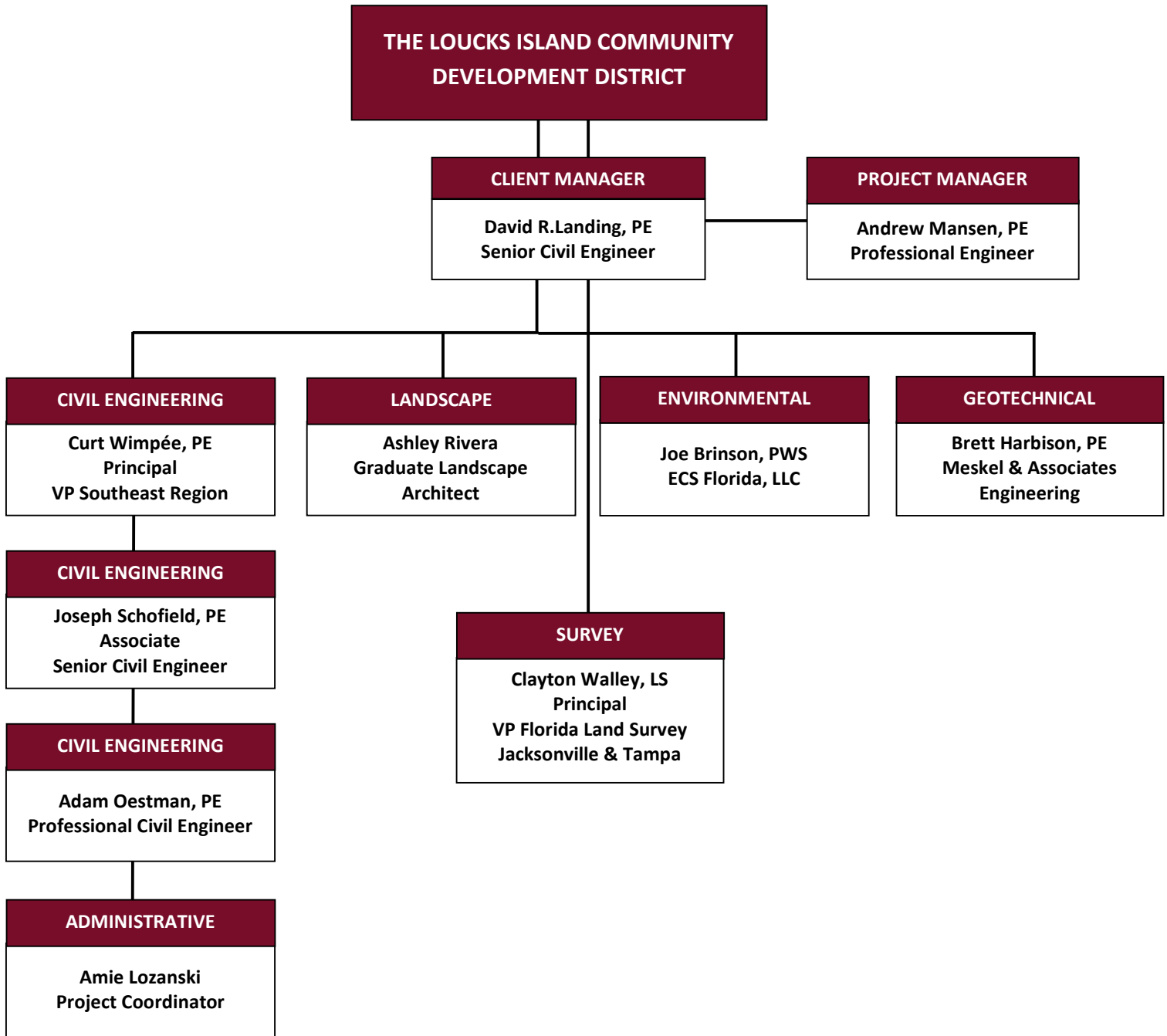
(Complete this section for the prime contractor and all key subcontractors.)

	(Check)			9. FIRM NAME	10. ADDRESS	11. ROLE IN THIS CONTRACT
	PRIME	JV	PARTNER SUBCON- TRACTOR			
a.	x			Alliant Engineering, Inc. <input checked="" type="checkbox"/> CHECK IF BRANCH OFFICE	3901 Coconut Palm Drive, Suite 102 Tampa, Florida 33619	Project Management, Civil Engineering, Landscape Services, Permitting, and Land Survey
b.			x	ECS Florida, LLC <input checked="" type="checkbox"/> CHECK IF BRANCH OFFICE	4524 N. 56 th Street Tampa, Florida 33610	Environmental Services
c.			x	Meskel & Associates Engineering <input checked="" type="checkbox"/> CHECK IF BRANCH OFFICE	2202 N. West Shore Boulevard Suite 200 Tampa, Florida 33607	Geotechnical Services
d.				<input type="checkbox"/> CHECK IF BRANCH OFFICE		
e.				<input type="checkbox"/> CHECK IF BRANCH OFFICE		

D. ORGANIZATIONAL CHART OF PROPOSED TEAM (EXHIBIT 1)

(Attached)

D. Organizational Chart of Proposed Team (Exhibit 1)



E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT
(Complete one Section E for each key person.)

12. NAME David R. Landing, PE	13. ROLE IN THIS CONTRACT Client Manager	14. YEARS EXPERIENCE	
		a. TOTAL 27	b. WITH CURRENT FIRM 1.5
15. FIRM NAME AND LOCATION <i>(City and State)</i> Alliant Engineering, Inc.			
16. EDUCATION <i>(Degree and Specialization)</i> BS, Civil Engineering, University of North Florida, UNF AS, Civil Engineering Technology, Savannah Technical College		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Professional Engineer in Florida (80483)	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i>			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i> CONTINUING ENGINEERING SERVICES TOWN OF ORANGE PARK, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES On-Going	CONSTRUCTION <i>(If applicable)</i>
a. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Under this on-going contract with the Town, Alliant recently completed a comprehensive pavement assessment within the Town of Orange Park. The assessment aimed to evaluate the current state of pavement infrastructure, identify deficiencies, and recommend appropriate maintenance or rehabilitation strategies in a detailed report.	<input checked="" type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> BARTRAM PARK COMMUNITY DEVELOPMENT DISTRICT JACKSONVILLE, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES On-Going	CONSTRUCTION <i>(If applicable)</i>
b. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Civil Engineering Services – Ongoing support to provide comprehensive civil engineering services on a continuing basis to ensure project success and compliance. Our scope includes periodic site visits to monitor construction progress, verify adherence to design specifications, and identify potential issues early. Following each visit, we deliver detailed reports documenting observations, recommendations, and any corrective actions needed.	<input checked="" type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> OTC (OAKLEAF TOWN CENTER) COMMUNITY DEVELOPMENT DISTRICT JACKSONVILLE, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES On-Going	CONSTRUCTION <i>(If applicable)</i>
c. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Civil Engineering Services – Ongoing support to provide comprehensive civil engineering services on a continuing basis to ensure project success and compliance. Our scope includes periodic site visits to monitor construction progress, verify adherence to design specifications, and identify potential issues early. Following each visit, we deliver detailed reports documenting observations, recommendations, and any corrective actions needed.	<input checked="" type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> RIDGWOOD TRAILS COMMUNITY DEVELOPMENT DISTRICT MIDDLEBURG, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES On-Going	CONSTRUCTION <i>(If applicable)</i>
d. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Civil Engineering Services – Ongoing support to provide comprehensive civil engineering services on a continuing basis to ensure project success and compliance. Our scope includes periodic site visits to monitor construction progress, verify adherence to design specifications, and identify potential issues early. Following each visit, we deliver detailed reports documenting observations, recommendations, and any corrective actions needed.	<input checked="" type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> TISON'S LANDING COMMUNITY DEVELOPMENT DISTRICT JACKSONVILLE, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES On-Going	CONSTRUCTION <i>(If applicable)</i>
d. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Civil Engineering Services – Ongoing support to provide comprehensive civil engineering services on a continuing basis to ensure project success and compliance. Our scope includes periodic site visits to monitor construction progress, verify adherence to design specifications, and identify potential issues early. Following each visit, we deliver detailed reports documenting observations, recommendations, and any corrective actions needed.	<input checked="" 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 Andrew Mansen, PE	13. ROLE IN THIS CONTRACT Project Manager	14. YEARS EXPERIENCE	
		a. TOTAL 14	b. WITH CURRENT FIRM 3.5
15. FIRM NAME AND LOCATION <i>(City and State)</i> Alliant Engineering, Inc.			
16. EDUCATION <i>(Degree and Specialization)</i> BS, Civil Engineering, California State University		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Professional Engineer in Florida (91277)	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i>			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
BARBER POINTE SUBDIVISION CITY OF MACCLENNY, FL	2025	
a. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm 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 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, FL	2024	
b. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Andrew led civil engineering efforts for 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	2024	
c. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm 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.		
OTC (OAKLEAF TOWN CENTER) COMMUNITY DEVELOPMENT DISTRICT JACKSONVILLE, FL	2024	
d. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Civil Engineering Services – Ongoing support to provide comprehensive civil engineering services on a continuing basis to ensure project success and compliance. Our scope includes periodic site visits to monitor construction progress, verify adherence to design specifications, and identify potential issues early. Following each visit, we deliver detailed reports documenting observations, recommendations, and any corrective actions needed.		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT
(Complete one Section E for each key person.)

12. NAME Joseph Schofield, PE	13. ROLE IN THIS CONTRACT Senior Civil Engineer	14. YEARS EXPERIENCE	
		a. TOTAL 21	b. WITH CURRENT FIRM 3
15. FIRM NAME AND LOCATION <i>(City and State)</i> Alliant Engineering, Inc.			
16. EDUCATION <i>(Degree and Specialization)</i> MBA, St. Leo University BS, Civil Engineering, University of North Florida (UNF)		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Professional Engineer in Florida (69219)	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i>			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
a. (1) SHADOWCREST AT ROLLING HILLS, PH. 3B & 3D GREEN COVE SPRINGS, FL	2023	
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm		
Mr. Schofield assisted the CDD to secure electrical and landscape maintenance easements. He also reviewed all contractors, vendors, and supplier invoices and pay applications to help ensure proper use of the bond funds. The scope included cost estimating and writing the Engineer's Report for Shadow Crest phase of the district full planned build-out.		
b. (1) BEACHVIEW COVE SUBDIVISION ORMOND BEACH, FL	2024	
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm		
Mr. Schofield oversaw 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.		
c. (1) PONCE PRESERVE SUBDIVISION PALM COAST, FL	2024	
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm		
Joe overseeing design and permitting for a 74-lot single family subdivision. All entitlements have been received; construction start date is undetermined at this time.		
d. (1) RYAN'S LANDING SUBDIVISION PALM COAST, FL	2024	
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm		
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.		
e. (1) UNIVERSITY OF FLORIDA CLUBHOUSE JACKSONVILLE, FL		
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input type="checkbox"/> Check if project performed with current firm		
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.		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT
(Complete one Section E for each key person.)

12. NAME Adam Oestman, PE	13. ROLE IN THIS CONTRACT Production Engineer	14. YEARS EXPERIENCE	
		a. TOTAL 6	b. WITH CURRENT FIRM 3
15. FIRM NAME AND LOCATION <i>(City and State)</i> Alliant Engineering, Inc.			
16. EDUCATION <i>(Degree and Specialization)</i> BS, Civil Engineering, Murray State University		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Professional Engineer in Florida (98440)	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i>			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
a. HYMON CIRCLE DRAINAGE IMPROVEMENTS BUNNELL, FL (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm 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.		
b. SAWMILL BRANCH, MULTI-PHASE SUBDIVISION PALM COAST, FL (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Lead design engineer preparing the construction documents for multiple single family residential subdivision phases totaling over 1,000 lots.		
c. PANAMA CITY BEACH HEALTH CAMPUS PANAMA CITY BEACH, FL (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Lead design engineer preparing construction documents for a phased medical campus as well as associated construction administration throughout the project.		
d. EPIC CHURCH PALM COAST, FL (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Serving as the lead design engineer, responsible for preparing comprehensive construction documents for the church facility and its associated recreational areas. This includes developing detailed plans, specifications, and technical drawings to ensure compliance with design standards, building codes, and project requirements. The role emphasizes coordination with stakeholders and consultants to deliver accurate, constructible, and cost-effective solutions.		
e. LADY LAKE APARTMENTS LADY LAKE, FL (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Lead design engineer preparing construction documents for 330 multi-family units and associated recreation areas.		
F. CARMEL COURT TOWNHOMES MIDDLEBURG, FL (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Lead design engineer preparing construction documents for a 35-townhome unit site as well as associated construction administration throughout the project.		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT
(Complete one Section E for each key person.)

12. NAME Curt Wimpée, PE	13. ROLE IN THIS CONTRACT Principal, VP Southeast Region	14. YEARS EXPERIENCE	
		a. TOTAL 29	b. WITH CURRENT FIRM 10

15. FIRM NAME AND LOCATION *(City and State)*
Alliant Engineering, Inc.

16. EDUCATION <i>(Degree and Specialization)</i> BS, Civil Engineering, University of Minnesota	17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Professional Engineer in Florida (79764) Minnesota (40487), Georgia (031340), N. Carolina (053415) S. Carolina (41355), and Tennessee (125610)
--	---

18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*
Professional Affiliations include American Society of Professional Engineers, FCARD, NEFBA, NAIOP, and ULI

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
a. CONSULTING ENGINEER CITY OF BUNNELL, FL (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm 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.		
b. CONTINUING ENGINEERING SERVICES TOWN OF ORANGE PARK, FL (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Under this on-going contract with the Town, Alliant recently completed a comprehensive pavement assessment within the Town of Orange Park. The assessment aimed to evaluate the current state of pavement infrastructure, identify deficiencies, and recommend appropriate maintenance or rehabilitation strategies in a detailed report.		
c. CONSULTING ENGINEER CITY OF JACKSONVILLE, BEACH, FL (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm 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.		
d. CONSULTING ENGINEER CITY OF ATLANTIC BEACH, FL (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm 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.		
e. CONSULTING ENGINEER CITY OF FERNANDINA BEACH, FL (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm 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.		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT
(Complete one Section E for each key person.)

12. NAME Ashley Rivera	13. ROLE IN THIS CONTRACT Graduate Landscape Architect	14. YEARS EXPERIENCE	
		a. TOTAL 4	b. WITH CURRENT FIRM 2
15. FIRM NAME AND LOCATION <i>(City and State)</i> Alliant Engineering, Inc.			
16. EDUCATION <i>(Degree and Specialization)</i> BS, Landscape Architecture, University of Ana G. Mendez Currently pursuing licensure as a Landscape Architect in Florida		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Pending	

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

a.	(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
	BLUE HERON FLATS DISC GOLF COURSE PALM COAST, FL	2024	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm		
	Alliant provided civil design services for the first disc golf course in Flagler County, located in Palm Coast, FL. The course is being built on nine acres of land donated to the city by Marbella Apartments, LLC. The course features 18-holes, restrooms, shade structures, parking lot, and water stations.		
	THE HARBOUR JACKSONVILLE, FL	2023	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm		
	Ashley assisted with the enhanced landscape development of The Harbour, a 43.8-acre luxury mixed-use development site located on Jacksonville's Intracoastal Waterway. This rare parcel will feature 560 residential units, 106,000 SF of hospitality/commercial/office space and up to 650 wet/dry marina boat storage slips.		
	SWEETGRASS ENHANCED LANDSCAPE ST. MARY'S, GA	2023	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm		
	Ashley played a key design roll for the 150-acre master planned community developed by Tierra Linda, which will include approximately 312 multi-family units and other commercial development opportunities.		
	WINTER HAVEN COMPLETE STREET DESIGN WINTER HAVEN, FL		
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm		
	Winter Haven has implemented complete street initiatives to make roadways safer and more inclusive for pedestrians, cyclists, and motorists. The city and Polk Transportation Planning Organization are working with Alliant on civil design to create a connected and sustainable transportation network by incorporating features like shared-use paths and sidewalks to improve overall safety and accessibility.		
	MATANZAS COVE AMENITY PALM COAST, FL	2024	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm		
	Ashley assisted with the Matanzas Cove Amenity Center which features a zero-entry pool (gradual beach like entry into the pool is a modern design element for easy access), cabana, and summer kitchen for the 55+ community. The design and features cater to an age-restricted community focused on a relaxed lifestyle.		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT
(Complete one Section E for each key person.)

12. NAME Clayton Walley, L.S., PSM	13. ROLE IN THIS CONTRACT VP Florida Land Survey	14. YEARS EXPERIENCE	
		a. TOTAL 25	b. WITH CURRENT FIRM 6
15. FIRM NAME AND LOCATION <i>(City and State)</i> Alliant Engineering, Inc.			
16. EDUCATION <i>(Degree and Specialization)</i> A.A.S. Industrial Engineering Technology, Paul D. Camp Community College BS Business, Project Management, University of Phoenix		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Licensed Surveyor in Florida (LS7209)	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i>			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
a. (1) TITLE AND LOCATION <i>(City and State)</i> STADIUM OF THE FUTURE, AREA C JACKSONVILLE, FL (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE 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.	2025	
<input checked="" type="checkbox"/> Check if project performed with current firm		
b. (1) TITLE AND LOCATION <i>(City and State)</i> RIVER CITY SCIENCE ACADEMY JACKSONVILLE, FL (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE 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 field technology, and pre-calculated data workflows allowed for accurate, efficient fieldwork and reduced costs for the client. Optional services such as building pad layout and storm-tech system staking were also available.		
<input checked="" type="checkbox"/> Check if project performed with current firm		
c. (1) TITLE AND LOCATION <i>(City and State)</i> PECAN PARK ROAD JACKSONVILLE, FL (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Survey Manager on this project that adds 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.	2023	
<input checked="" type="checkbox"/> Check if project performed with current firm		
d. (1) TITLE AND LOCATION <i>(City and State)</i> LIGHTHOUSE HARBOR SUBDIVISION PALM COAST, FL (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Pre-Development work completed for up to 845 residential units within the development. Work included boundary survey, topographic survey, tree survey, preliminary and final platting which completed the subdivision of land into legally recognized lots approved for development.	2024	
<input checked="" 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 Joe Brinson, PWS	13. ROLE IN THIS CONTRACT Environmental Senior Project Manager	14. YEARS EXPERIENCE	
		a. TOTAL 26	b. WITH CURRENT FIRM 3
15. FIRM NAME AND LOCATION <i>(City and State)</i> ECS Florida, LLC			
16. EDUCATION <i>(Degree and Specialization)</i> BS, Forest Resource Management / Forest Biometrics, University of Georgia		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Professional Wetland Scientist	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i>			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i> TOWN CENTER BOULEVARD PROPERTY PALM COAST, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
a. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Project Manager, ECS completed an ecological study with the purpose of evaluating the site for the occurrence and/or potential occurrence of jurisdictional wetlands and/or protected wildlife species and their habitats.		
(1) TITLE AND LOCATION <i>(City and State)</i> DIXIE ELLIS TRAIL JACKSONVILLE, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
b. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Project Manager, ECS completed a preliminary wetlands delineation study to evaluate jurisdictional wetlands and/or protected wildlife species and their habitats.		
(1) TITLE AND LOCATION <i>(City and State)</i> BEAUTYREST AVENUE PROPERTY JACKSONVILLE, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
c. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm 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.		
(1) TITLE AND LOCATION <i>(City and State)</i> FIRST COAST EXPRESSWAY MIDDLEBURG, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
d. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm 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.		
(1) TITLE AND LOCATION <i>(City and State)</i> BAINBRIDGE NOCATEE PARKWAY PROJECT JACKSONVILLE, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
d. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm 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.		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT
(Complete one Section E for each key person.)

12. NAME Brett H. Harbison, PE	13. ROLE IN THIS CONTRACT Director of Transportation & Geotechnical Services	14. YEARS EXPERIENCE	
		a. TOTAL 16	b. WITH CURRENT FIRM 5
15. FIRM NAME AND LOCATION <i>(City and State)</i> Meskel & Associates Engineering, PLLC			
16. EDUCATION <i>(Degree and Specialization)</i> BS, Civil Engineering, Florida State University (FSU) Graduate Courses, University of Central Florida		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Professional Engineer in Florida (74679) Professional Engineer in Georgia (PE37919)	
20. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i>			

21. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i> MONCRIEF PEDESTRIAN BRIDGE REPLACEMENT JACKSONVILLE, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
a. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Senior Engineer responsible for 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.		
(1) TITLE AND LOCATION <i>(City and State)</i> FDOT DISTRICT 2, I-95 NASSAU RIVER BRIDGE IMPROVEMENTS, DUVAL / NASSAU COUNTY, FL LINE	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
b. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm 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.		
(1) TITLE AND LOCATION <i>(City and State)</i> COJ NORTHBANK BULHEAD REPLACEMENT JACKSONVILLE, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
c. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm 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 through 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.		
(1) TITLE AND LOCATION <i>(City and State)</i> COJ SIDEWALK AND PEDESTRIAN IMPROVEMENTS JACKSONVILLE, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
d. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm 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.		

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <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 1
---	-------------------------------------

21. TITLE AND LOCATION <i>(City and State)</i> ANABELLE ISLAND, GREEN COVE SPRINGS, FL	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES 2022	CONSTRUCTION <i>(If applicable)</i>

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER KB Homes	b. POINT OF CONTACT NAME Forward Planner	c. POINT OF CONTACT TELEPHONE NUMBER (904) 596-6800
------------------------------	---	--

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



Project Highlights

- ▶ Phases 1A & 1B successfully supported construction with close coordination between design and field teams.
- ▶ Phase 2 is currently under construction, with Alliant leading the design and permitting efforts.
- ▶ Agency Coordination: Worked with Clay County and relevant regulatory bodies to ensure timely approvals and compliance.

Project Overview: Anabelle Island is a thoughtfully planned residential community located in the heart of Clay County, Florida. Once complete, the development will feature 369 single-family homes, a community pool and recreation center with direct access to local trail systems offering residents a blend of comfort, connectivity, and outdoor living.

Alliant's Role: Alliant has been a key partner in the development of Anabelle Island, providing comprehensive civil engineering, surveying, and permitting services across multiple phases of the project.

Impact: Anabelle Island is helping meet the growing demand for housing in one of Florida's fastest-growing regions. Alliant's involvement ensures the community is built on a strong foundation – both literally and figuratively – supporting long-term growth and quality of life for future residents.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a. (1) FIRM NAME Alliant Engineering, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Jacksonville, FL	(3) ROLE Project Engineer
b. (1) FIRM NAME Alliant Florida, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Jacksonville, FL	(3) ROLE Land Surveying

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <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> BEACHVIEW COVE, ORMOND BEACH, FL	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES 2023	CONSTRUCTION <i>(If applicable)</i>

23. PROJECT OWNER'S INFORMATION		
a. PROJECT OWNER Seagate Communities, Inc.	b. POINT OF CONTACT NAME Robert Gazzoli	c. POINT OF CONTACT TELEPHONE NUMBER (386) 206-5838

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

The Project required multiple approvals, including:

- ▶ Volusia County Master Plan Development Order and Final Development Order
- ▶ City of Ormond Beach utility approval
- ▶ Department of Health Domestic Water Permit
- ▶ FDEP Wastewater Permit
- ▶ FDOT Driveway, Drainage, and Utility Connection Permits
- ▶ FDEP Coastal Construction Field Permit
- ▶ SJRWMD Environmental Resource Permit



Nestled amidst ocean vistas and bordered by numerous state parks, this budding community of 28 single-family homes promises a peaceful, serene place to live.

Alliant provided professional surveying and platting services for the Beachview Cove development in Volusia County. Our team conducted fieldwork and prepared the plat in accordance with Chapter 177 of the Florida Statutes and applicable local municipal standards. Services included setting all required Permanent Reference Monuments (PRMs), Permanent Control Points (PCPs), and lot corners; preparing and submitting both preliminary and final plats; and addressing municipal comments through to final approval.

We began work within three weeks of receiving the executed proposal and supporting documentation, working closely with the client to ensure timely delivery. In addition to surveying and platting, Alliant led the site's civil engineering efforts, securing all necessary entitlements and permits to facilitate development.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT		
(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
a. Alliant Engineering, Inc.	Jacksonville, FL	Project Engineer

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <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;">3</p>
---	--

21. TITLE AND LOCATION <i>(City and State)</i> WILDLIGHT COMMUNITY, NASSAU COUNTY, FL	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER AJ Johns and Burnam	b. POINT OF CONTACT NAME Todd Patrick	c. POINT OF CONTACT TELEPHONE NUMBER (904) 641-2055
---	--	--

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



Our scope of work included layout staking for clearing limits, silt fencing, and pond construction, as well as establishing site control for GPS-guided machinery. We also conducted post-grading topographic surveys and provided as-built reviews and certifications. Through our efficient pre-calculated layout process and daily field reporting, we ensured precise and timely support throughout the project's development.

By facilitating the foundational development of Parcel 4B, Alliant is helping advance Wildlight's mission to create a community that blends diverse housing, integrated amenities, and preserved natural spaces—setting a new benchmark for thoughtful, long-term regional growth.

Wildlight is a 24,000-acre master-planned community in Nassau County, Florida designed to harmonize modern living with natural surroundings.

With over 7,000 acres dedicated to conservation and plans for more than 20,000 homes, Wildlight is poised to evolve over the coming decades into a vibrant, sustainable town. Alliant is proud to support this long-term vision by providing professional surveying services for Parcel 4B—an essential component of Wildlight's ongoing expansion.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
a. Alliant Florida, Inc.	Jacksonville, FL	Land Survey

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

21. TITLE AND LOCATION <i>(City and State)</i> ADVENTHEALTH, PALM COAST, FL	22. YEAR COMPLETED PROFESSIONAL SERVICES 2022	CONSTRUCTION <i>(If applicable)</i>
--	---	-------------------------------------

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER HuntonBrady Architects	b. POINT OF CONTACT NAME Christopher Dunlop, AIA, ACHA	c. POINT OF CONTACT TELEPHONE NUMBER (407) 839-0886
--	---	--

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



SERVICES

-  CIVIL ENGINEERING
-  CONSTRUCTION SERVICES
-  LAND SURVEY
-  TRAFFIC ENGINEERING

ADDITIONAL SERVICES

- Construction Engineering / Administration
- Construction Inspection
- Environmental Permits
- ADA Design
- Survey – Existing Conditions Survey
- Survey – ALTA Survey
- Traffic Operations – Traffic Impact Study

Alliant provided comprehensive civil engineering design, permitting, and coordination services for a new 100-bed hospital and medical office building located at the intersection of Palm Coast Parkway and Bridgehaven Drive.

Our scope included site planning, stormwater and utility design, erosion control measures, and off-site roadway improvements. Alliant also led the completion of the traffic impact study and coordinated closely with Florida Power & Light and other subconsultants to finalize construction documents.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a. (1) FIRM NAME Alliant Engineering, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Jacksonville, FL	(3) ROLE Project Engineer
b. (1) FIRM NAME Alliant Florida, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Jacksonville, FL	(3) ROLE Land Surveying

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

<p>21. TITLE AND LOCATION <i>(City and State)</i> HILLSBOROUGH COUNTY EMERGENCY VEHICLE PREEMPTION, TAMPA BAY, FL</p>	<p>22. YEAR COMPLETED PROFESSIONAL SERVICES 2025 CONSTRUCTION <i>(If applicable)</i></p>	
---	--	--

23. PROJECT OWNER'S INFORMATION

<p>a. PROJECT OWNER Hillsborough County, FL</p>	<p>b. POINT OF CONTACT NAME Scott Stromer</p>	<p>c. POINT OF CONTACT TELEPHONE NUMBER (813) 635-5400</p>
---	---	--

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



Alliant played a key role in bringing Saddlebrook Landings to life, a 216-unit apartment community nestled along Normandy Boulevard in Jacksonville, Florida.

Alliant provided civil site engineering, surveying, and permitting services for the phased development of this growing community. Our team led the preparation of final construction documents, including grading, utility design, stormwater management, and erosion control plans, while also offering construction administration support throughout the project.

We coordinated with multiple agencies to secure the necessary permits, including the City of Jacksonville, FDOT, SJRWMD, and FDEP, as well as with landscape and irrigation consultants to ensure a cohesive site design. With a focus on both current infrastructure needs and long-term growth, Alliant's work is helping shape a thriving residential hub in one of Florida's fastest-growing regions.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

<p>a. (1) FIRM NAME Alliant Engineering, Inc.</p>	<p>(2) FIRM LOCATION <i>(City and State)</i> Tampa, FL</p>	<p>(3) ROLE Traffic Engineer</p>
---	--	--------------------------------------

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

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

20. EXAMPLE PROJECT KEY NUMBER
6

21. TITLE AND LOCATION <i>(City and State)</i> SADDLEBROOK LANDINGS APARTMENT COMMUNITY, JACKSONVILLE, FL	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES 2020	CONSTRUCTION <i>(If applicable)</i>

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Landings Real Estate Group	b. POINT OF CONTACT NAME Chris Bicho	c. POINT OF CONTACT TELEPHONE NUMBER (401) 845-2200
--	---	--

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

Alliant played a key role in bringing Saddlebrook Landings to life, a 216-unit apartment community nestled along Normandy Boulevard in Jacksonville, Florida.

Alliant provided civil site engineering, surveying, and permitting services for the phased development of this growing community. Our team led the preparation of final construction documents, including grading, utility design, stormwater management, and erosion control plans, while also offering construction administration support throughout the project.

We coordinated with multiple agencies to secure the necessary permits, including the City of Jacksonville, FDOT, SJRWMD, and FDEP, as well as with landscape and irrigation consultants to ensure a cohesive site design. With a focus on both current infrastructure needs and long-term growth, Alliant's work is helping shape a thriving residential hub in one of Florida's fastest-growing regions.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Alliant Engineering, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Jacksonville, FL	(3) ROLE Project Engineer
b.	(1) FIRM NAME Alliant Florida, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Jacksonville, FL	(3) ROLE Land Surveying

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <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> WHITEVIEW VILLAGE SUBDIVISION, PALM COAST, FL	22. YEAR COMPLETED PROFESSIONAL SERVICES 2020	CONSTRUCTION <i>(If applicable)</i>
---	---	-------------------------------------

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER City of Bunnell, FL	b. POINT OF CONTACT NAME Dustin Vost, Infrastructure Director	c. POINT OF CONTACT TELEPHONE NUMBER (386) 437-7515
---	--	--

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

Located in Palm Coast, Florida, Whiteview Village provides housing for 202 families and features community amenities including a pool, cabana, and kayak launch—perfectly suited for Florida’s sunny climate.

Alliant played a key role in bringing this commuter-friendly neighborhood to life. The project’s success was driven by strong collaboration and partnerships across disciplines, showcasing how Alliant delivers value through integrated design, coordination, and a commitment to community-focused development.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a. (1) FIRM NAME Alliant Engineering, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Jacksonville, FL	(3) ROLE Project Engineer
b. (1) FIRM NAME Alliant Florida, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Jacksonville, FL	(3) ROLE Land Surveying

<p>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i></p>	<p>20. EXAMPLE PROJECT KEY NUMBER 8</p>
--	---

<p>21. TITLE AND LOCATION <i>(City and State)</i> TALLAHASSEE MEMORIAL HEALTHCARE CAMPUS EXPANSION TO PANAMA CITY BEACH, FL</p>	<p>22. YEAR COMPLETED PROFESSIONAL SERVICES 2022</p>	<p>CONSTRUCTION <i>(If applicable)</i></p>
---	--	--

<p>23. PROJECT OWNER'S INFORMATION</p>		
<p>a. PROJECT OWNER Panama City Beach, FL</p>	<p>b. POINT OF CONTACT NAME Dan Velazquez</p>	<p>c. POINT OF CONTACT TELEPHONE NUMBER (866) 417-7133</p>

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

In response to the rapid population growth in Panama City Beach and the surrounding Bay County area, Tallahassee Memorial Healthcare, the Florida State University College of Medicine, and The St. Joe Company have partnered to develop a state-of-the-art medical campus on approximately 87 acres in Panama City Beach.

The project is being developed in phases, with plans to ultimately include a 500-bed hospital and a variety of ancillary medical facilities. Phase I features a master plan for a four-story, 60,000-square-foot medical office building designed to provide primary and urgent care services, with future potential for orthopedic, cardiology, and surgical specialties.

As the civil engineer for the project, Alliant's master planning effort integrates long-term considerations, including roadway expansion and projected growth over the next 10 to 30 years. Particular attention has been given to access, site circulation, and wayfinding—factors that are essential to enhancing the overall patient and visitor experience.

The planning process prioritizes all sensory elements of the user journey—from initial campus visibility and arrival to ease of departure after each visit. In addition, the design responds to the vibrant bicycle and pedestrian activity in Panama City Beach and the critical need for efficient emergency vehicle access. These considerations will help shape a welcoming, accessible, and future-ready corridor as the campus expands to serve the evolving needs of the community.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

<p>a. (1) FIRM NAME Alliant Engineering, Inc.</p>	<p>(2) FIRM LOCATION <i>(City and State)</i> Jacksonville, FL</p>	<p>(3) ROLE Project Engineer</p>
<p>b. (1) FIRM NAME Alliant Florida, Inc.</p>	<p>(2) FIRM LOCATION <i>(City and State)</i> Jacksonville, FL</p>	<p>(3) ROLE Land Surveying</p>

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

<p>21. TITLE AND LOCATION <i>(City and State)</i> RIVERFRONT PLAZA, JACKSONVILLE, FL</p>	<p>22. YEAR COMPLETED PROFESSIONAL SERVICES 2024</p>	<p>CONSTRUCTION <i>(If applicable)</i></p>
--	--	--

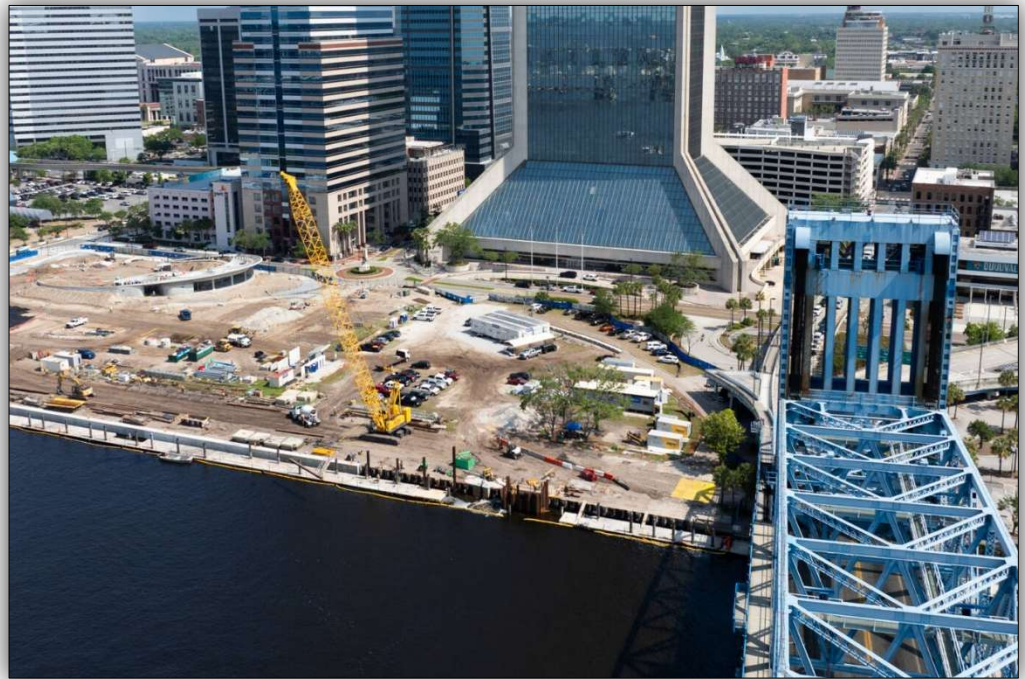
23. PROJECT OWNER'S INFORMATION

<p>a. PROJECT OWNER City of Jacksonville, FL</p>	<p>b. POINT OF CONTACT NAME Debbie Carter, Project Manager</p>	<p>c. POINT OF CONTACT TELEPHONE NUMBER (904) 574-9000</p>
--	--	--

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



A NEW DAY.



As part of the City of Jacksonville’s ambitious redevelopment initiative, Riverfront Plaza is emerging as a vibrant waterfront destination that celebrates the city’s connection to the St. Johns River. The project envisions expansive open parkland, immersive public art, versatile event spaces, and seamless pedestrian access—all designed to create lasting value for residents and visitors alike.

Alliant is proud to support this transformative effort by providing precise and responsive professional surveying services. Our team is responsible for layout staking, the preparation of as-built documentation, and daily field reporting to ensure clarity, accuracy, and compliance. By working in close coordination with contractors and city staff, we help bring the vision of Riverfront Plaza to life with the precision and care it deserves.

This is more than construction—it’s community building, placemaking, and a bold step toward redefining Jacksonville’s downtown riverfront.

Once complete, the new healthcare campus will significantly enhance access to medical care for the region’s growing population.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

<p>a. (1) FIRM NAME Alliant Florida, Inc.</p>	<p>(2) FIRM LOCATION <i>(City and State)</i> Jacksonville, FL</p>	<p>(3) ROLE Land Survey</p>
<p>b. (1) FIRM NAME</p>	<p>(2) FIRM LOCATION <i>(City and State)</i></p>	<p>(3) ROLE</p>

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <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;">10</p>
---	---

21. TITLE AND LOCATION <i>(City and State)</i> REVERIE AT PALM COAST, PALM COAST, FL	22. YEAR COMPLETED <table border="1" style="width: 100%;"> <tr> <td style="width: 50%;">PROFESSIONAL SERVICES 2024</td> <td style="width: 50%;">CONSTRUCTION <i>(If applicable)</i></td> </tr> </table>	PROFESSIONAL SERVICES 2024	CONSTRUCTION <i>(If applicable)</i>
PROFESSIONAL SERVICES 2024	CONSTRUCTION <i>(If applicable)</i>		

23. PROJECT OWNER'S INFORMATION		
a. PROJECT OWNER Sunbelt Land Management	b. POINT OF CONTACT NAME Ken Belshe	c. POINT OF CONTACT TELEPHONE NUMBER (386) 986-2411

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

Alliant serves as the Engineer of Record for the full design and permitting of a 421-home residential subdivision developed under a Community Development District (CDD). The scope includes comprehensive oversight and execution of all engineering design elements, from initial planning through final construction documentation. Alliant also prepared and submitted the Certified Engineer's Report, which included detailed cost estimating to support the CDD bond issuance process.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Alliant Engineering, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Jacksonville, FL	(3) ROLE Project Engineer
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <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 11
---	--------------------------------------

21. TITLE AND LOCATION <i>(City and State)</i> SWEETGRASS APARTMENTS, PHASE 1, ENHANCED LANDSCAPE ST MARY'S, GA	22. YEAR COMPLETED PROFESSIONAL SERVICES 2022	CONSTRUCTION <i>(If applicable)</i>
---	---	-------------------------------------

23. PROJECT OWNER'S INFORMATION		
a. PROJECT OWNER Sweetgrass Acquisition, LLC	b. POINT OF CONTACT NAME Jeff Klotz, Manager	c. POINT OF CONTACT TELEPHONE NUMBER (904) 247-5334

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



Sweetgrass is a 150-acre master planned development located in St. Mary's, Georgia, for Tierra Linda Development, LLC. The community will include 312 Class A multifamily units, 194 townhomes, 143 single-family homes, and 212,600 SF of commercial space. Designed as a walkable, mixed-use neighborhood, Sweetgrass will ultimately be home to approximately 650 families and feature integrated opportunities for housing, employment, shopping, recreation, and civic life.

Alliant's team provided comprehensive project management services in collaboration with the client, architect, and interior designer. Scope of work included enhanced landscape architecture and irrigation design, neighborhood entry monument and security gate, site civil design and permitting, and site electrical engineering (managed subconsultant). The amenity package included the clubhouse and pool deck, outdoor kitchen, shade structures, dog park, mail kiosk, and associated hardscape elements, contributing to a vibrant and functional community environment.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT		
a. (1) FIRM NAME Alliant Engineering, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Jacksonville, FL	(3) ROLE Project Engineer
b. (1) FIRM NAME Alliant Florida, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Jacksonville, FL	(3) ROLE Land Survey

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <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 12
---	--------------------------------------

21. TITLE AND LOCATION <i>(City and State)</i> TROUT CREEK COMMUNITY DEVELOPMENT DISTRICT, ST. JOHNS, FL	22. YEAR COMPLETED PROFESSIONAL SERVICES 2023 CONSTRUCTION <i>(If applicable)</i>
---	---

23. PROJECT OWNER'S INFORMATION		
a. PROJECT OWNER Trout Creek CDD	b. POINT OF CONTACT NAME Melissa Dobbins	c. POINT OF CONTACT TELEPHONE NUMBER (904) 436-6270

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



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 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.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a. (1) FIRM NAME ECS Florida, LLC	(2) FIRM LOCATION <i>(City and State)</i> Jacksonville, FL	(3) ROLE Environmental
--------------------------------------	---	---------------------------

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <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 11
---	--------------------------------------

21. TITLE AND LOCATION <i>(City and State)</i> SAWMILL BRANCH ROUNDABOUT, PALM COAST, FL	22. YEAR COMPLETED PROFESSIONAL SERVICES 2023	CONSTRUCTION <i>(If applicable)</i>
---	---	-------------------------------------

23. PROJECT OWNER'S INFORMATION		
a. PROJECT OWNER D.R. Horton, Inc.	b. POINT OF CONTACT NAME Shane Ricci	c. POINT OF CONTACT TELEPHONE NUMBER (952) 985-7272

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



Collaboration is at the heart of Alliant’s success, and the US 1 & N Old Kings Street and Sawmill Development project is a prime example of that principle in action.

Working seamlessly across disciplines, our team delivered comprehensive design and permitting services in close coordination with FDOT and key project stakeholders. While guiding the transportation improvements through every phase, we simultaneously supported the development of Sawmill Branch—an exciting new residential community featuring 1,000 homes, a community pool, clubhouse, dog park, and playground.

This project exemplifies Alliant’s commitment to building better communities through integrated infrastructure and thoughtful design.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
a.	Alliant Engineering, Inc.	Jacksonville, FL	Project Engineer
b.	Alliant Florida, Inc.	Jacksonville, FL	Land Survey

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <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 12
---	--------------------------------------

21. TITLE AND LOCATION <i>(City and State)</i> SHADOWCREST AT ROLLING HILLS, PH. 3B & 3C, GREEN COVE SPRINGS, FL	22. YEAR COMPLETED PROFESSIONAL SERVICES 2022 CONSTRUCTION <i>(If applicable)</i>
---	---

23. PROJECT OWNER'S INFORMATION		
a. PROJECT OWNER Shadow Crest at Rolling Hills CDD	b. POINT OF CONTACT NAME Marilee Giles	c. POINT OF CONTACT TELEPHONE NUMBER (904) 940-5850 Ext. 412

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



Mr. Schofield served as the District Engineer and Engineer of Record for a CDD infrastructure project supporting a 247-lot single-family platted phase. The project was funded through a bond issuance and required seamless coordination with the primary CDD Engineer responsible for the adjacent Shadow Crest phase, which was under concurrent construction. Monthly board meetings were attended jointly to provide updates on each respective phase.

Shadow Crest included construction of a lift station designed to receive effluent from both developments. Mr. Schofield facilitated the acquisition of electrical and landscape maintenance easements and conducted detailed reviews of contractor, vendor, and supplier invoices and pay requests to ensure the proper use of bond proceeds. His responsibilities also included cost estimating and preparation of the Engineer's Report for the full planned build-out of the Shadow Crest phase.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a. (1) FIRM NAME Alliant Engineering, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Jacksonville, FL	(3) ROLE Project Engineer
b. (1) FIRM NAME Alliant Florida, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Jacksonville, FL	(3) ROLE Land Survey

G. KEY PERSONNEL PARTICIPATION IN EXAMPLE PROJECTS

26. NAMES OF KEY PERSONNEL (From Section E, Block 12)	27. ROLE IN THIS CONTRACT (From Section E, Block 13)	28. EXAMPLE PROJECTS LISTED IN SECTION F (Fill in "Example Projects Key" section below before completing table. Place "X" under project key number for participation in same or similar role.)													
		1	2	3	4	5	6	7	8	9	10	11	12	13	14
David R. Landing, PE	Civil Engineering														
Andrew Mansen, PE	Civil Engineering	X	X				X		X						
Joseph Schofield, PE	Civil Engineering	X	X	X			X		X		X		X		X
Adam Oestman, PE	Production Manager			X	X		X	X			X		X		X
Curt Wimpée, PE	Civil Engineering			X	X			X			X				
Ashley Rivera	Landscape Architecture	X		X				X			X	X			X
Clayton Walley, L.S.	Survey	X		X			X	X		X		X		X	X

29. EXAMPLE PROJECTS KEY

NO.	TITLE OF EXAMPLE PROJECT (From Section F)	NO.	TITLE OF EXAMPLE PROJECT (From Section F)
1.	Anabelle Island	8.	Tallahassee Memorial Healthcare Campus Exp.
2.	Beachview Cove	9.	Riverfront Jax
3.	Wildlight Community	10.	Spring Lake Subdivision
4.	AdventHealth	11.	Sweetgrass Multi-Family
5.	Hillsborough County EVP	12.	Trout Creek Community Development District
6.	Saddlebrook Landings	13.	Sawmill Branch Roundabout
7.	Whiteview Subdivision	14.	Rolling Hills Community Development District

H. ADDITIONAL INFORMATION – PROJECT TEAM BIOS

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

DAVID R. LANDING, PE – CLIENT MANAGER



Mr. Landing is a Senior Civil Engineer with over 27 years' experience in pipelines and trenchless design with experience working on a variety of projects across the United States with a focus on water and wastewater projects in northeast Florida. His design experience includes water and wastewater treatment facilities, pressure and gravity pipelines, civil site design, stormwater design, with emphasis on large diameter pipelines and trenchless installations. His experience in pipeline design includes feasibility studies, design and construction support, design calculations, and drawing production.

ANDREW MANSEN, PE – PROJECT MANAGER

Mr. Mansen is a Civil Engineer with 14 years of experience in civil design. He holds a Bachelor of Science in Civil Engineering from California State University, earned in 2011. Mr. Mansen has contributed to the design, review, and management of numerous public and private site development projects across California and Florida, bringing a solid foundation of technical knowledge and a collaborative approach to every project.



JOSEPH SCHOFIELD, PE – SENIOR CIVIL ENGINEER



Mr. Schofield is a Senior Engineer with over 21 years of experience in civil design and construction oversight. He has contributed design, review, and project management expertise to hundreds of public and private roadway and site development projects across the southeastern United States. Throughout his career, Mr. Schofield has collaborated with numerous state agencies and local municipalities to advance diverse infrastructure initiatives aimed at improving transportation systems nationwide. His extensive experience and commitment to delivering high-quality, community-focused solutions make him a valuable leader on any civil engineering project.

H. ADDITIONAL INFORMATION – PROJECT TEAM BIOS

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

CURT WIMPÉE, PE – SENIOR CIVIL ENGINEER

Mr. Wimpée brings 28 years of experience in municipal engineering, land development, and transportation. His expertise spans a wide range of projects, including localized and regional utility extensions, lift station design, roadway reconstructions for both municipalities and Departments of Transportation, new roadway development, maintenance of traffic (MOT) plans, signage and striping plans, concrete and asphalt pavement design, stormwater management systems, and regional drainage studies. He has also led engineering efforts for residential, mixed-use, and large-scale commercial developments. As Alliant's Principal-in-Charge, Mr. Wimpée is committed to leading project design teams through clear communication, well-defined goals, and ongoing accountability. He also serves as a key liaison between district staff, permitting agencies, and the design team to ensure coordination, efficiency, and successful project delivery.



ADAM OESTMAN, PE – PRODUCTION MANAGER



Mr. Oestman brings over six years of experience in the design and construction of private infrastructure projects. His portfolio includes a wide range of commercial, medical, municipal, and residential developments. He has been involved in all phases of project delivery, including land acquisition, contract review, site assessment, land planning, development cost analysis, scheduling, regulatory approvals, preparation of contract documents, and construction administration. His comprehensive expertise ensures efficient and effective project execution from concept to completion.

**ASHLEY RIVERA
GRADUATE LANDSCAPE ARCHITECT**

Ms. Rivera is a skilled landscape designer with over three years of experience in land development, specializing in marketing graphics, renderings, planting design, and design standardization. With a natural artistic talent and a strong eye for detail, she creates efficient, sustainable outdoor spaces that foster meaningful connections to nature. Ashley is passionate about blending aesthetic vision with practical functionality to deliver thoughtful, innovative landscape solutions. Her work consistently reflects a commitment to sustainability, user experience, and the success of each project she supports.



H. ADDITIONAL INFORMATION – PROJECT TEAM BIOS

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

CLAYTON WALLEY, L.S., PSM VP FLORIDA LAND SURVEY



Mr. Walley brings over 25 years of experience in land surveying across multiple states. His expertise includes large-scale boundary and topographic surveys, construction staking, and as-built surveys. Clayton is highly skilled in project management, GPS mission planning and execution, low-altitude UAV data acquisition, and CAD drafting. With a comprehensive understanding of both field and office operations, he plays a critical role in ensuring the accuracy, efficiency, and success of complex surveying projects.

JOE BRINSON, PWS – ENVIRONMENTAL SENIOR PROJECT MANAGER

Mr. Brinson brings over 26 years of experience in environmental consulting, with expertise in wetland permitting, protected species assessments, timber evaluations, greenbelt determinations, and arborist services. As a Senior Environmental Project Manager at ECS, he oversees all phases of environmental project execution, including proposal development, regulatory compliance (including SPEC/NPDES), budgeting, and reporting. His role involves direct client engagement, coordination of field activities, report preparation and review, as well as invoicing and business development. Mr. Brinson's broad technical knowledge and leadership ensure efficient, compliant, and client-focused project delivery.

BRETT H. HARBISON, PE – DIRECTOR OF TRANSPORTATION AND GEOTECHNICAL SERVICES PRINCIPAL ENGINEER

With over 18 years of experience in field operations, laboratory testing, and geotechnical analysis across Florida, **Mr. Harbison** leads the complete geotechnical process—from drilling and sampling to laboratory testing and engineering analysis. He has managed geotechnical services for a wide range of Florida Department of Transportation (FDOT) projects, utilizing both Design-Bid-Build and Design-Build delivery methods. As a Certified SmartPile EDC system user, Brett has performed dynamic load testing on numerous pre-stressed, pre-cast concrete driven piles for bridge foundation projects throughout the state.

H. ADDITIONAL INFORMATION – LICENSURE & PREQUALIFICATIONS

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

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 in **Appendix A**.


FIRM LICENSURE AND PREQUALIFICATIONS

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 and 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
- ◆ 8.4 – Right of Way Mapping

I. AUTHORIZED REPRESENTATIVE
The foregoing is a statement of facts.

	November 10, 2025
31. SIGNATURE	32. DATE
Curt Wimpée, PE / Principal, VP Southeast Region	
32. NAME AND TITLE	

H. ADDITIONAL INFORMATION – CDD EXPERIENCE

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

Alliant’s Continued Growth in the Community Development District Segment:

Alliant Engineering, Inc. recognizes that Community Development Districts (CDDs) are special-purpose units of local government established to plan, finance, construct, and maintain public infrastructure within residential communities. These Districts play a vital role in supporting sustainable development and enhancing residents’ quality of life.

Over the past few years, Alliant has expanded its presence and reputation in the CDD sector, providing dependable engineering services across Florida. Below is a list of communities currently supported by Alliant:

District Name	Location	Year Alliant Became the District Engineer
Tison’s Landing	Duval County, Florida	2023
Ridgewood Trails	Clay County, Florida	2024
Oakleaf Town Center (OTC)	Clay County, Florida	2024
Bartram Park	Duval County, Florida	2024
The Trails	Duval County, Florida	2024
CrossCreek	Manatee County, Florida	2025
Glen St. Johns	Duval County, Florida	2025
Eagle Point CDD	Manatee County, Florida	2025

Our growth in this segment began with the successful partnership of Tison’s Landing in 2023, where we continue to provide comprehensive general engineering services to support infrastructure planning and development.

Building on this success, Alliant was selected in 2024 to serve four additional districts—expanding our footprint and reinforcing our reputation as a reliable and responsive engineering partner.

In 2025, this positive trajectory continued, as we remain committed to the thoughtful growth and improvement of each community we serve.

Across all engagements, Alliant delivers innovative, cost-effective, and sustainable engineering solutions while consistently exceeding client expectations. We are proud of the relationships we’ve built and look forward to supporting the ongoing success of these districts through collaborative planning and quality engineering.

VOLUME OF WORK PREVIOUSLY AWARDED BY THE DISTRICT: Alliant Engineering, Inc. has not previously performed work for this district.

H. ADDITIONAL INFORMATION

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

COMPREHENSIVE EXPERTISE AND PROVEN COMMITMENT

Alliant Engineering, Inc. delivers professional design and project management services across a broad spectrum of disciplines, including municipal infrastructure, land development, transportation, traffic engineering, landscape architecture, and surveying. Our foundation is a diverse, multidisciplinary team of talented professionals dedicated to delivering high-quality design, management, and construction services.

Founded in 1995, Alliant brings over 30 years of experience serving both public and private clients. Our collaborative, integrated management approach enables us to efficiently execute projects while maintaining an exceptional level of quality. We consistently add value by pairing unmatched civil engineering expertise with innovated, forward-thinking solutions.

In addition to our technical qualifications, we possess a deep understanding of the infrastructure challenges faced by smaller communities. The key staff proposed for this project are recognized experts in their fields and are well equipped to provide the ongoing engineering services required of a District Engineer.

Key Program – Level Roles: To ensure the successful delivery of services, Alliant provides structured program leadership supported by the following critical roles:

- ▶ **Client Manager / Project Lead:** Responsible for assembling tailored project teams, providing overall project insight, and serving as the primary point of contact for the District. David R. Landing, PE has been selected as Client Manger due to his 28 years of experience and deep understanding of Community Development District (CDD) project dynamics. David will attend district meetings (when necessary) and oversee both construction and engineering services.
- ▶ **Quality Management Oversight:** David will also ensure all team members are fully trained in Alliant's Quality Management Process and that these protocols are rigorously applied across all individual projects.
- ▶ **Project Manager:** Tasked with assigning appropriate team members to individual work orders and ensuring consistency in formatting, deliverables, and technical standards across all projects. This role also serves as a key technical resource for the entire project team.

Our team is structured for agility and accountability, enabling us to execute work orders efficiently while ensuring high-quality,



Client Manager

David R. Landing, PE



Project Manager

Andrew Mansen, PE

H. ADDITIONAL INFORMATION

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

In 2018 Alliant was selected to provide city-wide engineering services for the City of Flagler Beach, FL. Our team played a key role in securing \$1 million in grant funding for cured-in-place pipe (CIPP) lining of over seven miles of gravity sewer infrastructure. We continue to serve the City with the same dedication and commitment to excellence.

In 2020, Alliant was selected to provide professional engineering services to the City of Atlantic Beach, FL. We collaborated with the Public Works Director to assess the condition of the City's existing maintenance building and presented the Commission with repair and replacement options, including cost estimates.

Tison's Landing CDD – In 2023, Alliant began providing general engineering services to support infrastructure planning and development within this growing Community Development District.

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

In 2024 Alliant expanded its footprint by being selected to provide engineering services to these additional CDDs, Ridgewood Trails, Oakleaf Town Center, Bartram Park, and The Trails CDDs, reinforcing our role as a trusted partner in community development districts.

In 2025, Continuing our growth, Alliant was selected to support three more CDDs, CrossCreek, Glen St. Johns, and Eagle Landing. We are excited to help guide the expansion of these communities through sound engineering and collaborative planning.

Through each of these partnerships, alliant has demonstrated our commitment to exceeding client expectations with innovative, cost-effective, and sustainable engineering solutions.

At Alliant, relationships aren't just part of the job—they're the reason we're chosen time and time again. For over 30 years, we've built lasting partnerships across the public and private sectors, knowing that strong connections lead to smoother projects, stronger outcomes, and greater opportunities for our clients. We protect what we build—because when our clients succeed, so do we.

Public Sector Solutions Built on Experience and Trust

In public projects, the right team makes all the difference. At Alliant, we deliver exactly that. Each project is led by a seasoned professional and backed by a team of dedicated experts who bring a pragmatic, results-driven approach. We prioritize respect, accountability, and quality—ensuring your project's success while making your job easier from start to finish.



Private Sector Support that Goes Beyond the Blueprint

In the private sector, where every decision counts and time is money, having a team you can trust is everything. At Alliant, we're with you from start to finish—handling the design, navigating entitlements, and clearing the path forward. We don't just solve problems, we anticipate them, helping you move faster, smarter, and with confidence.

Balancing Vision, Value and Viability

At Alliant, we understand that maximizing value, meeting market-driven goals, and creating sustainable developments are top priorities. That's why we take a thoughtful approach—vetting design options that align with your vision while addressing community needs and regulatory requirements. The result: smart, balanced solutions tailored to your project site and long-term success.

H. ADDITIONAL INFORMATION

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

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. **David R. Landing, 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

Staff	20%				40%				60%				80%				100%			
Client Manager	█				█				█				█				█			
Project Manager	█				█				█				█				█			
Water Resources	█				█				█				█				█			
Professional Land Surveyor	█				█				█				█				█			
Roadway Design	█				█				█				█				█			
Construction and Inspection	█				█				█				█				█			
Contract Administration	█				█				█				█				█			

Percent Committed
 CDD
 Excess Availability



To fully address the criteria outlined in the RFQ, this supplemental information content further demonstrates Alliant Engineering's Qualifications, expertise, and capacity to perform all anticipated work under contract in the role of District Engineer.

H. ADDITIONAL INFORMATION

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

ARCHITECT-ENGINEER QUALIFICATIONS				SOLICITATION NUMBER (if any)		
PART II – GENERAL QUALIFICATIONS <i>(if a firm has branch offices complete for each specific branch office seeking work.)</i>						
Alliant Engineering, Inc.				YEAR ESTABLISHED 1995	YEAR ESTABLISHED 41-1818046	
3901 Coconut Palm Drive, Suite 102				OWNERSHIP		
Tampa, Florida 33619				TYPE Corporation		
David R. Landing, PE, Client Manager				SMALL BUSINESS STATUS N/A		
(813) 954-4337		jsprouse@alliant-inc.com		NAME OF FIRM Alliant Engineering, Inc.		
EMPLOYEES BY DISCIPLINE				PROFILE OF FIRM'S EXPERIENCE AND ANNUAL AVERAGE REVENUE FOR LAST 5 YEARS		
Function Code	Discipline	Number of Employees		Profile Code	Experience	Revenue Index Number
		Firm	Branches			
02	Administrative	18	3	E10	Environmental & Natural Resource Map	4
08	CAD Technician	12	2	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	21	3	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			
TOTAL:		188	17			
ANNUAL AVERAGE PROFESSIONAL SERVICES REVENUES OF FIRM FOR LAST 3 YEARS (Insert revenue index number as shown at right)				PROFESSIONAL SERVICES REVENUE INDEX NUMBER		
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		
c. Total Work	9	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		

I. AUTHORIZED REPRESENTATIVE *(The foregoing is a statement of facts.)*

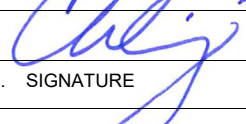
	November 10, 2025
33. SIGNATURE	32. DATE
Curt Wimpée, PE / Principal, VP Southeast Region	
34. NAME AND TITLE	

H. ADDITIONAL INFORMATION

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

ARCHITECT-ENGINEER QUALIFICATIONS				SOLICITATION NUMBER (if any)		
PART II – GENERAL QUALIFICATIONS						
<i>(if a firm has branch offices complete for each specific branch office seeking work.)</i>						
Meskel & Associates Engineering, PLLC				YEAR ESTABLISHED 2008		YEAR ESTABLISHED DVZYP4E9Q3L8
2202 N. West Shore Blvd., Suite 200				OWNERSHIP		
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		
EMPLOYEES BY DISCIPLINE				PROFILE OF FIRM'S EXPERIENCE AND ANNUAL AVERAGE REVENUE FOR LAST 5 YEARS		
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
TOTAL: 41						
ANNUAL AVERAGE PROFESSIONAL SERVICES REVENUES OF FIRM FOR LAST 3 YEARS (Insert revenue index number as shown at right)				PROFESSIONAL SERVICES REVENUE INDEX NUMBER		
d. Federal Work	4	1. Less than \$100,000		6. \$2 million to less than \$5 million		
2. Non-Federal Work	7	2. \$100,000 to less than \$250,000		7. \$5 million to less than \$10 million		
3. Total Work	7	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		

I. AUTHORIZED REPRESENTATIVE *(The foregoing is a statement of facts.)*

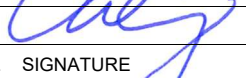
	November 10, 2025
35. SIGNATURE	32. DATE
Curt Wimpée, PE / Principal, VP Southeast Region	
36. NAME AND TITLE	

H. ADDITIONAL INFORMATION

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

ARCHITECT-ENGINEER QUALIFICATIONS				SOLICITATION NUMBER (if any)		
PART II – GENERAL QUALIFICATIONS (if a firm has branch offices complete for each specific branch office seeking work.)						
ECS Florida, LLC				YEAR ESTABLISHED 2017	YEAR ESTABLISHED MNVJKQ85HFG3	
4524 N. 56th Street				OWNERSHIP		
Tampa, Florida 33610				TYPE Limited Liability Company		
Rey Ruiz, PE, SI – Branch Manager				SMALL BUSINESS STATUS N/A		
(904) 519-6990		tina@meskelengineering.com		NAME OF FIRM ECS Florida, LLC		
EMPLOYEES BY DISCIPLINE				PROFILE OF FIRM'S EXPERIENCE AND ANNUAL AVERAGE REVENUE FOR LAST 5 YEARS		
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
TOTAL:		294	77			
ANNUAL AVERAGE PROFESSIONAL SERVICES REVENUES OF FIRM FOR LAST 3 YEARS (Insert revenue index number as shown at right)				PROFESSIONAL SERVICES REVENUE INDEX NUMBER		
e. Federal Work	3	1. Less than \$100,000		6. \$2 million to less than \$5 million		
f. Non-Federal Work	9	2. \$100,000 to less than \$250,000		7. \$5 million to less than \$10 million		
g. Total Work	9	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		

I. AUTHORIZED REPRESENTATIVE (The foregoing is a statement of facts.)

	November 10, 2025
37. SIGNATURE	32. DATE
Curt Wimpee, PE / Principal, VP Southeast Region	
38. NAME AND TITLE	

APPENDIX A FORMS, LICENSES, AND CERTIFICATIONS

ALLIANT ENGINEERING, INC.

November 10, 2025



State of Florida

Woman Business Certification

Meskel & Associates Engineering, PLLC

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

05/04/2023 to 05/04/2025



J. Todd Inman
Florida Department of Management Services



Office of Supplier Diversity
4050 Esplanade Way, Suite 380
Tallahassee, FL 32399
850-487-0915
www.dms.myflorida.com/osd

Ron DeSantis, Governor
Melanie S. Griffin, Secretary



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

SPROUSE, WAYNE J
4810 SUMMERALL ROAD
PLANT CITY FL 33567

LICENSE NUMBER: PE60821
EXPIRATION DATE: FEBRUARY 28, 2027
Always verify licenses online at MyFloridaLicense.com



Do not alter this document in any form.
This is your license. It is unlawful for anyone other than the licensee to use this document.

Ron DeSantis, Governor
Melanie S. Griffin, Secretary



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

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

LICENSE NUMBER: PE91277
EXPIRATION DATE: FEBRUARY 28, 2027
Always verify licenses online at MyFloridaLicense.com



Do not alter this document in any form.
This is your license. It is unlawful for anyone other than the licensee to use this document.

Ron DeSantis, Governor
Melanie S. Griffin, Secretary



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

WIMPEE, CURTIS MARCEL
11410 WILDECROFT TERRACE
JACKSONVILLE FL 32223

LICENSE NUMBER: PE79764
EXPIRATION DATE: FEBRUARY 28, 2027
Always verify licenses online at MyFloridaLicense.com



Do not alter this document in any form.
This is your license. It is unlawful for anyone other than the licensee to use this document.

Ron DeSantis, Governor
Melanie S. Griffin, Secretary



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


SCHOFIELD, JOSEPH RYAN
10475 FORTUNE PKWY.
SUITE 101
JACKSONVILLE FL 32256

LICENSE NUMBER: PE69219
EXPIRATION DATE: FEBRUARY 28, 2027
Always verify licenses online at MyFloridaLicense.com



Do not alter this document in any form.
This is your license. It is unlawful for anyone other than the licensee to use this document.

Ron DeSantis, Governor
Melanie S. Griffin, Secretary




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

OESTMAN, ADAM VIKTOR
12844 BEAUBIEN RD
JACKSONVILLE FL 32258

LICENSE NUMBER: PE98440
EXPIRATION DATE: FEBRUARY 28, 2027
Always verify licenses online at MyFloridaLicense.com



Do not alter this document in any form.
This is your license. It is unlawful for anyone other than the licensee to use this document.

Ron DeSantis, Governor
Melanie S. Griffin, Secretary



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

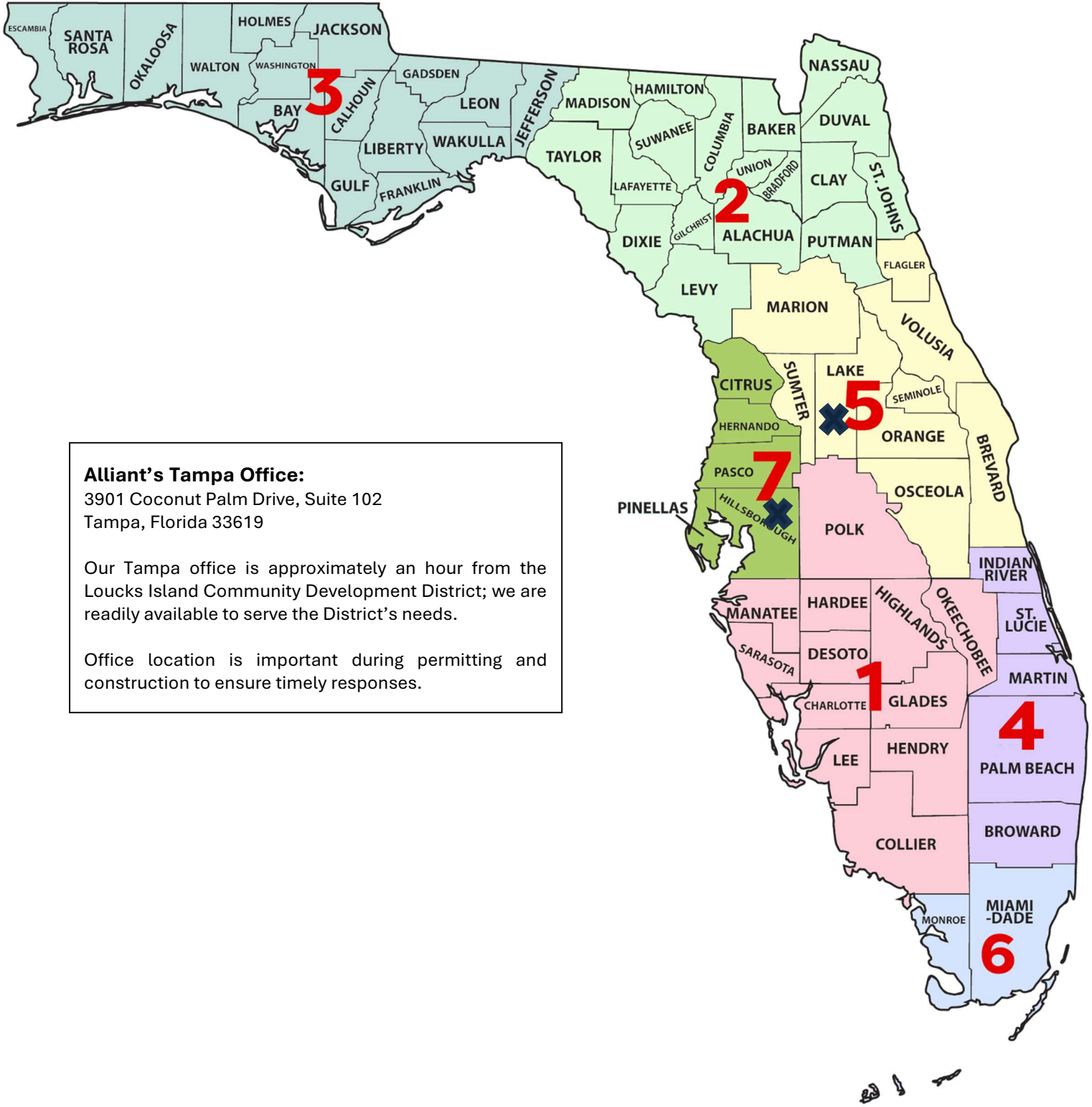
LANDING, DAVID REED
3072 GOLDEN POND BLVD
ORANGE PARK FL 32073

LICENSE NUMBER: PE80483
EXPIRATION DATE: FEBRUARY 28, 2027
Always verify licenses online at MyFloridaLicense.com



Do not alter this document in any form.
This is your license. It is unlawful for anyone other than the licensee to use this document.

Exhibit 3 – Location Map



Alliant's Tampa Office:
 3901 Coconut Palm Drive, Suite 102
 Tampa, Florida 33619

Our Tampa office is approximately an hour from the Loucks Island Community Development District; we are readily available to serve the District's needs.

Office location is important during permitting and construction to ensure timely responses.

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT**

14CII



Loucks Island CDD
REQUEST FOR QUALIFICATIONS
FOR ON-CALL CIVIL ENGINEERING SERVICES



Prepared By:

Request for Qualifications
Prepared for: Loucks Island CDD



GERMANA ENGINEERING AND ASSOCIATES, LLC
Engineering Firm #29279
1120 West Minneola Avenue
Clermont, FL 34711
(352) 242-9329



1120 West Minneola Avenue
Clermont, Florida 34711
Phone: (352) 242-9329
Engineering Firm Registry # 29279

November 10, 2025

Loucks Island Community Development District

**Re: *Request for Qualifications.
Engineering Services for the Loucks Island Community Development District***

Qualification Statement and Letter to the CDD

Loucks Island Community Development District has made a long-term commitment to improve the quality of life for its residents. The continuing professional engineering services under this contract are part of that vision. We at **Germana Engineering and Associates** take great pride in providing our clients with quality Civil Engineering Services. We are grateful for the opportunity to potentially provide these services to the CDD . Our firm is **located at 1120 West Minneola Avenue, Clermont FL, 34711**. The firm is owned and led by **Christopher Germana**, a civil engineer who brings experience and a collaborative mindset that elevates his team.

Project Manager's Experience Serving Municipalities

Throughout my past 30+ years of civil engineering experience, I have had the opportunity to serve many local municipalities. This includes Sumter and Orange counties; the cities of Clermont, Lady Lake, Wildwood, and Port Orange; and The Villages District Government.

By serving these municipalities, I have gained experience that will be valuable to the CDD. I have designed and managed a variety of civil engineering projects specializing in roadways, fire stations, drainage studies, streetscape, public involvement, grant assistance, multi-use trails, parks, and recreation centers. No job is too big or too small for our team as we take pride in the diversity of our projects.



Cost-Effective Solutions



We are committed to finding a cost-effective approach for all projects and under this contract we will work diligently to identify the best solutions within the CDD's budgets and constraints. We have a vested interest in the CDD and will exceed the expectations for the district and residents.

Project Manager's Long-Term Local Commitment

Our office is located in Downtown Clermont and Christopher Germana has lived in South Lake County for 25+ years. With that said, our interest in the areas success and vision is not just business, but a personal commitment to where we call home. We are proud to have worked on many local municipal projects over the years that have allowed local communities to flourish. Some City projects include the following:

- Oakley Seaver Drive
- Library- Minneola
- Legends Way
- Fire Station # 1
- Fire Station # 3
- Downtown Streetscape
- Kehlor Recreation Building
- City Stormwater Studies
- Winona Bridge

**Some of the professional experience listed above was performed while at another firm.*

Christopher Germana has a long history of working with the City of Clermont. His first project in the area was the Clermont Sonny's BBQ site back in 1999.



Service Areas We Are Applying For Include The Following:

- **ADA Compliance Evaluation**
- **Civil Engineering**
- **Construction Administration and Inspection Services**
- **Permitting and Regulatory Compliance**
- **Stormwater Management and Drainage Design**
- **Utility Coordination and Engineering**

Master Plan

Working in South Lake County for many years as well as having an office in Downtown Clermont, we understand the CDD's vision. Over the years we have successfully worked on private and public projects that are a part of the CDD's. We are eager to further assist the CDD by implementing its vision.



Summary

We appreciate the opportunity to submit our qualifications and are committed to making the CDD our top priority. As a firm that lives and works locally, we want to emphasize our commitment to the CDD and its community. We look forward to providing professional civil engineering services to the CDD.

Regards,

GERMANA ENGINEERING AND ASSOCIATES, LLC



Christopher M. Germana, P.E.
Project Manager/Principal In-Charge

ABILITY AND ADEQUACY OF PROFESSIONAL PERSONNEL

Germana Engineering and Associates provides a highly experienced and well-structured team specifically suited for the planning, design, permitting, and construction support of Community Development District (CDD) subdivision projects in Central Florida.

Germana Engineering and Associates, LLC has the professional staff, technical capability, and organizational structure necessary to successfully provide engineering services for the District. Our team is composed of qualified professionals experienced in residential subdivision design, permitting, utility infrastructure, stormwater management, roadway design, and construction administration.

The firm is led by Christopher Germana, P.E., who will serve as Principal-in-Charge and Project Manager for District assignments. Mr. Germana brings extensive experience in land development and infrastructure projects throughout Central Florida, including work supporting Community Development Districts and municipal clients. He remains directly involved in all phases of project delivery to ensure quality, responsiveness, and continuity.

Key team members supporting District projects include:

- Dakota McCoy – Civil CAD Designer responsible for preparation of construction plans, grading and drainage design, and Civil 3D production.
- Pedro Esaki – Civil CAD Designer supporting engineering design, permitting coordination, and technical analysis for utilities, stormwater systems, and roadway improvements.
- Sharron Morton – Civil Cad Designer Permitting and administrative support, providing coordination with regulatory agencies, submittal tracking, and project documentation.
- Marie Germana – Office Manager responsible for project administration, scheduling, invoicing, and ensuring efficient communication between the District and project team.

This team structure allows Germana Engineering and Associates to provide both technical expertise and administrative support necessary to efficiently deliver projects from concept through construction. Our personnel are capable of managing multiple assignments concurrently while maintaining high standards for quality, schedule, and budget control.

Our approach emphasizes senior-level involvement, clear communication, and responsiveness to the needs of the District Board, staff, and consultants. By maintaining a lean but highly effective team, we are able to provide personalized service while ensuring adequate staffing resources for projects of varying size and complexity. Our experience with residential subdivision and public infrastructure projects demonstrates the ability and adequacy of our professional personnel to successfully serve the District's current and future needs.

CONSULTANT'S PAST PERFORMANCE

A firm is not greater than its reputation and is built on consistency and quality. As an established and growing firm, we place significant emphasis on quality control and quality assurance. We achieve quality by striving to improve on one project at a time. We pledge to work with the District and share a vision for what is needed and then carry out technically sound solutions.

Germana Engineering has been voted Best of South Lake – Engineer. We are proud and grateful to serve our long-term clients throughout the South Lake County Community. For the past 5 years Germana Engineering has been awarded the Best Engineer in South Lake County.



Municipality Experience

Germana Engineering and Associates, LLC has successfully provided civil engineering and consulting services to municipalities, special districts, and private development clients throughout Central Florida. Our experience includes working with local governments, utility providers, and regulatory agencies to deliver projects that meet strict permitting, design, and construction standards.

Germana Engineering and Associates has provided Civil Engineering Consulting Services for **Clermont and Minneola**. Christopher Germana, while at another firm, has provided Civil Engineering Consulting Services for **Lady Lake, Port Orange, Sumter County and Wildwood**,

CDD Experience

Germana Engineering and Associates, LLC has served as the **Interim District Engineer for the Loucks Island Community Development District (CDD)**, providing responsive, technically sound, and cost-conscious engineering services during a critical phase of district development and transition.

Christopher Germana, Owner of Germana Engineering and Associates, LLC, brings extensive experience working with municipalities throughout Central Florida. Prior to founding the firm, Mr. Germana served in a key engineering role at a previous consulting firm where he provided civil engineering services for projects within the **The Villages Community Development Districts (CDD)**.

For many years Christopher Germana, has designed large-scale residential and infrastructure projects within **The Villages**, which is one of the nation's largest master-planned communities. He has contributed to roadway, grading, drainage, and utility design in accordance with CDD standards. This work was conducted while Christopher Germana was at a previous consulting firm.

Throughout this time Christopher Germana served as project manager for design for thousands of residential lots, multiple recreation centers, and numerous commercial areas. Some of the responsibilities include the following:

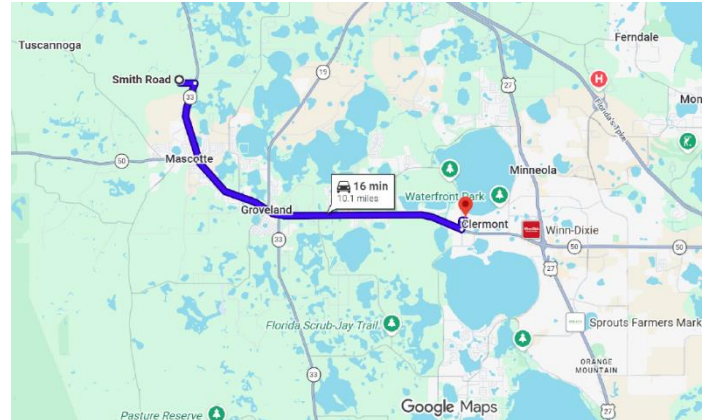
- Contributed to **civil site design**, including grading, drainage, roadway layout, and utility infrastructure for large-scale master-planned communities.
- Performed **stormwater management system design and permitting**, coordinating with applicable Water Management Districts and regulatory agencies.
- Assisted in **potable water and wastewater system design**, including hydraulic considerations and coordination with utility providers.
- Supported **permitting efforts** at local and state levels, ensuring compliance with applicable codes, standards, and agency requirements.
- Participated in **construction administration**, including plan review, responses to RFIs, and coordination with contractors and stakeholders.
- Demonstrated ability to work within **highly structured development standards and guidelines** typical of large master-planned communities.
- Experience contributing to projects requiring **strict adherence to schedule, budget, and quality control measures**.

As noted above, the work at The Villages was conducted while Christopher Germana was at a previous consulting firm.

GEOGRAPHIC LOCATION

Project Manager and Teams Commitment

Christopher Germana will serve as Project Manager and is committing to a line-term commitment. Not only does Christopher work in South Lake County he has lived in Lake County for over 25 years. Germana Engineering and Associates is only a few miles from the Loucks Island project. In addition, the entire staff at Germana Engineering also works in South Lake County. With that said it is Christopher interest in the District's success and vision isn't just business it a personal commitment



Germana Engineering and Associates headquarters is in South Lake County and brings a strong understanding of the regional conditions that directly influence the planning, design, and permitting of Community Development District (CDD) subdivision projects. Our familiarity with local soils, groundwater conditions, floodplains, and stormwater management requirements allows us to develop practical and efficient design solutions tailored to the specific characteristics of the project area.

Our team has extensive experience working within the regulatory frameworks of Florida's Water Management Districts, FDEP, and local jurisdictions throughout Central Florida. This local knowledge enables us to anticipate agency expectations, streamline permitting processes, and reduce potential delays associated with regulatory review.

In addition, our proximity to the project site allows for responsive service, including timely site visits, coordination meetings, and construction support. We understand the importance of being readily available to address field conditions and provide real-time solutions during construction.

By combining local expertise with hands-on project involvement, Germana Engineering and Associates, LLC provides a level of service that supports efficient project delivery and successful implementation of CDD infrastructure.

WILLINGNESS TO MEET TIME AND BUDGET REQUIREMENTS

An engineer's willingness and ability to meet time and budget requirements is a critical aspect of project success, often balancing technical quality against constraints, say, of time, scope, and cost. While engineers are typically driven by quality, they must operate within project constraints, requiring a blend of, say, strategic planning, regular communication, and accurate forecasting.

Germana Engineering and Associates, LLC is committed to delivering Community Development District (CDD) subdivision projects in accordance with established schedules and budget constraints. We recognize that CDD projects require careful coordination between development timelines, financing milestones, public infrastructure phasing, and regulatory approvals, and we structure our services to support these critical elements.

Our approach emphasizes early project planning, accurate scope definition, and disciplined cost management. We develop realistic schedules aligned with permitting and construction sequencing, and we actively track progress against key milestones to ensure timely delivery. Our team maintains ongoing coordination with the Developer, District Engineer, contractors, and regulatory agencies to minimize delays and maintain project momentum.

We understand the financial sensitivities associated with CDD-funded infrastructure and are committed to designing practical, cost-effective solutions that align with project budgets while meeting all applicable standards and long-term maintenance considerations. Throughout the project, we provide responsive communication, timely deliverables, and proactive problem-solving to avoid cost overruns and schedule impacts.

Germana Engineering and Associates, LLC is prepared to dedicate the necessary personnel and resources to successfully deliver the project on time and within budget, while maintaining the high level of quality expected for public infrastructure serving the District.

CERTIFIED MINORITY BUSINESS ENTERPRISE

Germana Engineering and Associates, LLC is not a certified Minority Business Enterprise (MBE). However, the firm is strongly committed to advancing diversity, equity, and inclusion within the engineering and construction industry.

Germana Engineering actively seeks to partner with certified MBE, DBE, and small business firms and incorporates these subconsultants into project teams whenever opportunities are available. The firm maintains relationships with a network of qualified and certified firms to support surveying, geotechnical engineering, environmental services, construction administration, and specialty consulting services.

In addition, Germana Engineering promotes inclusive procurement practices by identifying opportunities for meaningful participation by certified firms and encouraging their involvement throughout project delivery. The firm is committed to supporting local and regional diversity initiatives and ensuring that qualified minority-owned businesses are given full and fair consideration.

Through this approach, Germana Engineering demonstrates its ongoing commitment to diversity while delivering high-quality, responsive engineering services to its clients.

RECENT, CURRENT AND PROJECTED WORKLOADS

Germana Engineering and Associates, LLC maintains an active and well-managed workload consisting primarily of civil engineering services for residential subdivisions, municipal infrastructure projects throughout surrounding Central Florida regions. Recent and ongoing projects include single-family subdivision design, utility infrastructure improvements, stormwater management systems, permitting through local jurisdictions and Water Management Districts, and construction-phase services.

Our current workload has been strategically structured to emphasize projects within close geographic proximity to our office in Clermont, Florida. This regional focus enhances efficiency, allows for frequent site visits, and supports timely coordination with local agencies, utility providers, and contractors. By concentrating our efforts within Central Florida, we are able to maintain strong relationships with reviewing agencies and respond quickly to project needs.

The firm utilizes a proactive workload management approach, distributing assignments among experienced team members. This ensures that each project receives adequate attention while maintaining flexibility to address schedule demands, review cycles, and construction support.

Based on our current commitments and projected project pipeline, Germana Engineering and Associates, LLC has sufficient capacity to undertake additional assignments without compromising quality or responsiveness. Our team is well-positioned to dedicate the necessary resources to this project, ensuring adherence to schedules, budgets, and the specific needs of the Community Development District.

VOLUME OF WORK PREVIOUSLY AWARDED TO CONSULTANT BY DISTRICT

Germana Engineering and Associates, LLC is currently serving as the District's Interim Engineer, providing continuity of engineering services and support. Although the overall volume of work awarded has been limited, our ongoing role has allowed us to develop a strong understanding of the District's systems, challenges, and operational needs.

This direct experience enables us to provide immediate value, minimize transition time, and deliver responsive, efficient, and well-informed engineering services to the District.

Additionally, as the original design engineer for the Loucks Island subdivision, our firm has in-depth knowledge of the District's system design, permitting, and construction. This dual role uniquely positions our team to deliver immediate value, minimize learning curves, and provide efficient, well-informed engineering services.

While Germana Engineering is a growing firm, our leadership brings substantial and directly relevant experience. Christopher Germana (while at another firm) has previously provided engineering services for The Villages Community Development Districts, where he supported the planning, design, and implementation of residential infrastructure, utilities, and stormwater systems.

As a smaller firm Germana Engineering offers a streamlined structure where the District benefits from:

- Direct involvement of senior engineering personnel on a day-to-day basis
- Clear and consistent communication without unnecessary layers
- Faster turnaround times for reviews, revisions, and deliverables
- Greater flexibility to respond to changing project needs or priorities

Our current workload is intentionally maintained at a level that ensures quality, responsiveness, and accountability. The District will not be competing for attention among numerous ongoing assignments, but instead will receive focused, priority-driven service.

Germana Engineering views this opportunity as a long-term partnership and is fully committed to exceeding the District's expectations. Our lack of prior contracts with the District should be viewed as a strategic advantage—providing the capacity, accessibility, and dedication necessary to deliver efficient, high-quality results from the outset.

APPLICABLE FEDERAL, STATE, AND LOCAL LICENSES

PROOF OF BUSINESS REGISTRATION WITH THE FLORIDA DEPARTMENT OF STATE

2025 FLORIDA LIMITED LIABILITY COMPANY ANNUAL REPORT

DOCUMENT# L09000109604
Entity Name: GERMANA ENGINEERING AND ASSOCIATES, LLC
Current Principal Place of Business:
 1120 W. MINNEOLA AVENUE
 CLERMONT, FL 34711

Current Mailing Address:
 1120 W. MINNEOLA AVENUE
 CLERMONT, FL 34711 US

FEI Number: 27-3672037
Name and Address of Current Registered Agent:
 GERMANA, CHRISTOPHER M
 1120 W. MINNEOLA AVENUE
 CLERMONT, FL 34711 US

FILED
Apr 28, 2025
Secretary of State
6489758789CC

Certificate of Status Desired: No

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

SIGNATURE: _____
Electronic Signature of Registered Agent Date

Authorized Person(s) Detail :
 Title: MGR
 Name: GERMANA, CHRISTOPHER M
 Address: 1120 W. MINNEOLA AVENUE
 City-State-Zip: CLERMONT FL 34711

I hereby certify that the information indicated on this report or supplemental report is true and accurate and that my electronic signature shall have the same legal effect as if made in person, that I am a managing member or manager of the limited liability company or the partner or trustee empowered to execute this report as required by Chapter 605, Florida Statutes, and that I am not a resident alien, or an attorney-in-fact, or an attorney-at-law.

SIGNATURE: CHRISTOPHER GERMANA **MANAGER**
Electronic Signature of Signing Authorized Person(s) Detail 04/28/2025
Date

State of Florida
Department of State


I certify from the records of this office that GERMANA ENGINEERING AND ASSOCIATES, LLC is a limited liability company organized under the laws of the State of Florida, filed on November 13, 2009, effective November 13, 2009.

The document number of this limited liability company is L09000109604.

I further certify that said limited liability company has paid all fees due this office through December 31, 2025, that its most recent annual report was filed on April 28, 2025, and that its status is active.

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




 Secretary of State


Tracking Number: 0435180867CU
 To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.
<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>

CHRISTOPHER GERMANA PE LICENSE



GERMANA ENGINEERING & ASSOCIATES STATE OF FLORIDA LICENSE

THE OFFICIAL SITE OF THE FLORIDA DEPARTMENT OF BUSINESS & PROFESSIONAL REGULATION



Florida Department of Business & Professional Regulation

[HOME](#) [CONTACT US](#) [MY ACCOUNT](#)

ONLINE SERVICES

- [Apply for a License](#)
- [Verify a Licensee](#)
- [View Food & Lodging Inspections](#)
- [File a Complaint](#)
- [Continuing Education Course Search](#)
- [View Application Status](#)
- [Find Exam Information](#)
- [Unlicensed Activity Search](#)
- [AB&T Delinquent Invoice & Activity List Search](#)

LICENSEE DETAILS 9:42:49 AM 9/16/2025

Licensee Information

Name:	GERMANA ENGINEERING & ASSOCIATES, LLC (Primary Name)
Main Address:	1120 WEST MINNEOLA AVE CLERMONT Florida 34711
County:	LAKE

License Information

License Type:	Engineering Business Registry
Rank:	Registry
License Number:	29279
Status:	Current
Licensure Date:	10/14/2010
Expires:	

Special Qualifications **Qualification Effective**

--	--

Alternate Names

--	--

[View Related License Information](#)
[View License Complaint](#)

2801 Blair Stone Road, Tallahassee FL 32399 - Email: [Customer Contact Center](#) - Customer Contact Center: 850.487.1395

The State of Florida is an AA/EEO employer. Copyright ©2023 Department of Business and Professional Regulation - State of Florida [Privacy Statement](#)

Under Florida law, email addresses are public records. If you do not want your email address released in response to a public-records request, do not send electronic mail to this entity. Instead, contact the office by phone or by traditional mail. If you have any questions, please contact 850.487.1395. *Pursuant to Section 455.279(1), Florida Statutes, effective October 1, 2012, licensees licensed under Chapter 455, F.S., must provide the Department with an email address if they have one. The emails provided may be used for official communication with the licensee. However email addresses are public record. If you do not wish to supply a personal address, please provide the Department with an email address which can be made available to the public. Please see our [Chapter 455](#) page to determine if you are affected by this change.

ARCHITECT-ENGINEER QUALIFICATIONS

PART I - CONTRACT-SPECIFIC QUALIFICATIONS

A. CONTRACT INFORMATION

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

Germana Engineering and Associates, LLC

2. PUBLIC NOTICE DATE

10/25/2025

3. SOLICITATION OR PROJECT NUMBER

RFQ Engineering Services for the Locks Island CDD

B. ARCHITECT-ENGINEER POINT OF CONTACT

4. NAME AND TITLE

Christopher Germana, P.E. (FL)

5. NAME OF FIRM

Germana Engineering and Associates

6. TELEPHONE NUMBER

352-516-4303

7. FAX NUMBER

8. E-MAIL ADDRESS

cgermana@germanaengineering.com

C. PROPOSED TEAM

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

(Check)				9. FIRM NAME	10. ADDRESS	11. ROLE IN THIS CONTRACT
	PRIME	J-V PARTNER	SUBCONTRACTOR			
a.	✓			Germana Engineering and Associates, LLC <input type="checkbox"/> CHECK IF BRANCH OFFICE	1120 W. Minneola Avenue Clermont, Florida 34711	Civil Engineering Consultant
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

(Attached)

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

Complete one Section E for each key person.)

12. NAME Christopher Germana, P.E. (FL)	13. ROLE IN THIS CONTRACT Civil Engineer/Project Manager	14. YEARS EXPERIENCE	
		a. TOTAL 30	b. WITH CURRENT FIRM 15
15. FIRM NAME AND LOCATION <i>City and State)</i> Germana Engineering and Associates, LLC Clermont, FL			
16. EDUCATION <i>Degree and Specialization)</i> University of Central Florida Bachelor of Science - Civil Engineering 1996 Edison Community College Associates of Arts 1993		17. CURRENT PROFESSIONAL REGISTRATION <i>State and Discipline)</i> Professional Engineer- Civil Engineering (Florida)	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>Publications, Organizations, Training, Awards, etc.)</i>			

19. RELEVANT PROJECTS






a. 	1) TITLE AND LOCATION <i>City and State)</i> Montverde Academy Middle School Montverde, Florida	2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2020	CONSTRUCTION <i>If applicable)</i> 2021
3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm The Middle School consists of a 2 story 40,000 SF building which includes large modern classrooms, science and technology labs, and a 12,000 SF gymnasium dedicated to Middle School physical education classes, assemblies, and other activities. Scope included Civil Engineering site layout, grading, utilities stormwater management, and construction phase services support. Project Cost: \$12.8 Million			
b. 	1) TITLE AND LOCATION <i>City and State)</i> Montverde Academy Science Center Addition Montverde, Florida	2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2017	CONSTRUCTION <i>If applicable)</i> 2018
3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Expansion of the existing Science Building consisted of a 4,595 SF addition. The new addition connected to the existing building which allowed for additional classrooms and labs. Scope included Civil Engineering site layout, grading, utilities, stormwater management, and construction phase services support. Project Cost: \$600,000			
c. 	1) TITLE AND LOCATION <i>City and State)</i> Hospital Campus - Orlando Health Davenport, Florida	2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2017	CONSTRUCTION <i>If applicable)</i> 2018
3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm A 46,072 SF freestanding Hospital in Davenport. This site is located in an area where there was a large demand for emergency health care. The project also included approximately 0.80 miles of off-site 2 lane roadway connecting US 192 to US 27. Scope included Civil Engineering related site layout, grading, utilities, stormwater management, and construction phase services support.			
d. 	1) TITLE AND LOCATION <i>City and State)</i> Outpatient Surgery Center - Orlando Health Clermont, Florida	2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2019	CONSTRUCTION <i>If applicable)</i> 2020
3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm The project consisted of a 29,096 SF state-of-the-art surgery center designed. The site is unique due to its topography and has a 60' grade change across the project. Integrated design approach was used due to unique topography of the area, allowing the Client to save money on construction cost. Scope included Civil Engineering related site layout, grading, utilities, stormwater management, and construction phase services support.			
e. 	1) TITLE AND LOCATION <i>City and State)</i> The Fresh Market - Raleigh, NC Raleigh, North Carolina	2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2016	CONSTRUCTION <i>If applicable)</i> 2017
3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Redevelopment of the existing Fresh Market located Raleigh - Cameron Village Center. The team provided a design approach to keep the store in operation while implementing the building and site renovation. Scope included Civil Engineering related site layout, grading, utilities, and permitting.			

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

Complete one Section E for each key person.)

12. NAME Christopher Germana, P.E. (FL)	13. ROLE IN THIS CONTRACT Civil Engineer/Project Manager	14. YEARS EXPERIENCE	
		a. TOTAL 30	b. WITH CURRENT FIRM 15
15. FIRM NAME AND LOCATION <i>City and State)</i> Germana Engineering and Associates, LLC Clermont, FL			
16. EDUCATION <i>Degree and Specialization)</i> University of Central Florida Bachelor of Science - Civil Engineering 1996 Edison Community College Associates of Arts 1993		17. CURRENT PROFESSIONAL REGISTRATION <i>State and Discipline)</i> Professional Engineer- Civil Engineering (Florida)	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>Publications, Organizations, Training, Awards, etc.)</i>			

19. RELEVANT PROJECTS

f. 	1) TITLE AND LOCATION <i>City and State)</i> The Fresh Market - Lakewood Ranch, Florida Manatee County, Florida	2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2023	CONSTRUCTION <i>If applicable)</i> 2024
	3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Conversion of an existing retail building to a new Fresh Market. The Civil related renovation included store entrance conversion, and utility modifications to support a grocery store use. Scope included Civil Engineering related site related layout, grading, utilities, and construction phase services support.	<input checked="" type="checkbox"/> Check if project performed with current firm	
g. 	1) TITLE AND LOCATION <i>City and State)</i> City of Clermont - Kehlor Recreation Center Orlando, Florida	2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2018	CONSTRUCTION <i>If applicable)</i> 2019
	3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Part of the City's master plan for downtown included a new center, a 1,937 SF facility which features a multipurpose room. This building replaced the original recreation building which was constructed approximately 60 years ago. Scope included Civil Engineering site related layout, grading, utilities, stormwater management, and construction phase services support. Project Cost: \$250,000	<input checked="" type="checkbox"/> Check if project performed with current firm	
h. 	1) TITLE AND LOCATION <i>City and State)</i> City of Minneola - Library Minneola, Florida	2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2023	CONSTRUCTION <i>If applicable)</i> 2024
	3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Provided Civil Engineering design and permitting for a new library in Downtown Minneola. As part of this project we worked with the City to create a site that provides learning opportunities through native landscape area for workshops or to enjoy reading a book in a outdoor environment. Solar EV charging station was integrated into the site. Scope included Civil Engineering related site layout, grading, utilities, and stormwater management. Photo provided by Powell Studio Architecture Project Cost \$2.9 Million	<input checked="" type="checkbox"/> Check if project performed with current firm	
i. 	1) TITLE AND LOCATION <i>City and State)</i> Walt Disney World Orlando, Florida	2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2024	CONSTRUCTION <i>If applicable)</i>
	3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Design and permitting for improvements for multiple projects located in all four theme parks and various guest resorts. Our projects range from support buildings and infrastructure throughout all parks on various projects ranging from animal enclosures and habitats for Animal Kingdom, to food service support infrastructure for various parks, site improvements supporting theme park rides and renovations at guest resort areas.	<input checked="" type="checkbox"/> Check if project performed with current firm	
j. 	1) TITLE AND LOCATION <i>City and State)</i> Wesley Christian Academy Clermont, Florida	2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2023	CONSTRUCTION <i>If applicable)</i> 2024
	3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE A new 2 story 24,820 SF school building with 17 classrooms. This building is located on a large topography drop where the building was integrated into the embankment with a open pavilion integrated into the embankment. Scope included Civil Engineering related site layout, grading, utilities, and construction phase services support. Project Cost: 4 Million	<input checked="" 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 Dakota McCoy	13. ROLE IN THIS CONTRACT Civil Engineer Intern/Drafter	14. YEARS EXPERIENCE	
		a. TOTAL 7	b. WITH CURRENT FIRM 7

15. FIRM NAME AND LOCATION *City and State)*
 Germana Engineering and Associates, LLC Clermont, FL

16. EDUCATION <i>Degree and Specialization)</i> University of Central Florida Bachelor of Science - Civil Engineering 2018	17. CURRENT PROFESSIONAL REGISTRATION <i>State and Discipline)</i> N/A
--	---

18. OTHER PROFESSIONAL QUALIFICATIONS *Publications, Organizations, Training, Awards, etc.)*
 N/A

19. RELEVANT PROJECTS

a. 	1) TITLE AND LOCATION <i>City and State)</i> Heron's Glen Mascotte, Florida	2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2024	CONSTRUCTION <i>If applicable)</i>
	3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Development of a 701 lot single family residential subdivision on a 243 Acre property. Design includes master infrastructure including roadway, utilities and stormwater management system. Scope includes master planning, site layout, grading, utilities, stormwater and agency permitting. Project Cost: 18 Million		
b. 	1) TITLE AND LOCATION <i>City and State)</i> Outpatient Surgery Center Clermont, Florida	2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2019	CONSTRUCTION <i>If applicable)</i> 2020
	3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Development of an outpatient surgery center on a hospital campus. Design includes master infrastructure including roadway, utilities and stormwater management system. Scope includes master planning, site layout, grading, utilities, stormwater, and agency permitting. Project Cost: 1.3 Million		
c. 	1) TITLE AND LOCATION <i>City and State)</i> Medical Park Drive Clermont, Florida	2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2019	CONSTRUCTION <i>If applicable)</i> 2020
	3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Development of a roadway extension and infrastructure extension to accommodate a growing hospital campus. Design includes master infrastructure including roadway, utilities and stormwater management system. Project Cost: 300 Thousand		
d. 	1) TITLE AND LOCATION <i>City and State)</i> Sports Medicine Institute Clermont, Florida	2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2021	CONSTRUCTION <i>If applicable)</i>
	3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm This 5.0 AC project proposed a unique 2-story 18,212 SF medical office and an additional 5,428 SF Office Pad. This project features intense grading to accommodate 53 feet of elevation change across the site. Many retaining walls and safety measures such as guard rails were required to maximize the site's potential. Engineering services provided: layout; grading; utility layout; drainage. Project Cost: 1 Million. Role: Drafter and Engineer.		
e. 	1) TITLE AND LOCATION <i>City and State)</i> Ormond Beach Woodspring Suites Ormond Beach, Florida	2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2024	CONSTRUCTION <i>If applicable)</i>
	3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Development of an 122 room 4 story hotel. Design includes master infrastructure including roadway, utilities and stormwater management system.		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

Complete one Section E for each key person.)




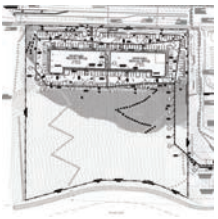

12. NAME Pedro Esaki	13. ROLE IN THIS CONTRACT Civil Drafter	14. YEARS EXPERIENCE	
		a. TOTAL 5	b. WITH CURRENT FIRM 5

15. FIRM NAME AND LOCATION *City and State)*
Germana Engineering and Associates, LLC Clermont, FL

16. EDUCATION <i>Degree and Specialization)</i> University of Central Florida Bachelor of Science - Aerospace Engineering 2019 Lake-Sumter State College Associates of Arts 2018	17. CURRENT PROFESSIONAL REGISTRATION <i>State and Discipline)</i> N/A
--	---

18. OTHER PROFESSIONAL QUALIFICATIONS *Publications, Organizations, Training, Awards, etc.)*
 N/A

19. RELEVANT PROJECTS

a.	1) TITLE AND LOCATION <i>City and State)</i> Wesley Christian Academy Clermont, Florida	2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2023	CONSTRUCTION <i>If applicable)</i> 2024
	3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm A new 2-story 24,820 SF school building with 17 classrooms and a pavilion. The project area features a steep ~17 foot elevation change. Despite the large topographic challenges, the building was successfully integrated within an embankment. Engineering services provided: layout; grading; utility layout; construction phase services support. Project Cost: 4 Million. Role: Drafter and Engineer.		
b.	1) TITLE AND LOCATION <i>City and State)</i> Nickelodeon Hotel Kissimmee, Florida	2) YEAR COMPLETED	
	3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm This 10.11 AC project proposes a 11-story hotel with 211 guest rooms and 181 condo hotels, and a 3-story garage. This project features very unique architecture that require the use of pedestrian and vehicular ramps. Project cost: Unknown. Role: Drafter.		
c.	1) TITLE AND LOCATION <i>City and State)</i> Sports Medicine Institute Clermont, Florida	2) YEAR COMPLETED	
	3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm This 5.0 AC project proposed a unique 2-story 18,212 SF medical office and an additional 5,428 SF Office Pad. This project features intense grading to accommodate 53 feet of elevation change across the site. Many retaining walls and safety measures such as guard rails were required to maximize the site's potential. Engineering services provided: layout; grading; utility layout; drainage. Project Cost: 1 Million. Role: Drafter.		
d.	1) TITLE AND LOCATION <i>City and State)</i> Hooks Street Medical Office Clermont, Florida	2) YEAR COMPLETED	
	3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm This 9.31 AC project proposes 2 medical offices totaling 34,992 SF. This project featured a large 77 feet of elevation change. To maximize the viability of the site, the project is coordinating with an adjacent parcel, connecting to their master stormwater drainage system. Engineering services provided: layout; grading; utility layout; drainage calculations. Project cost: \$500,000. Role: Drafter		
e.	1) TITLE AND LOCATION <i>City and State)</i> The Grove at Pine Meadows Eustis, Florida	2) YEAR COMPLETED	
	3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm This 24.96 AC subdivision proposes 60 single-family lots. A portion is adjacent to an existing water body and wetlands. These conditions required the firm to look at big-picture grading, where some lots are relatively low next to the lake, but some lots are high and facilitate a wet stormwater pond water. Engineering services provided: layout; grading; utility layout; drainage calculations. Project Cost: 3 million. Role: Drafter and Engineer.		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

Complete one Section E for each key person.)


12. NAME Shari Morton	13. ROLE IN THIS CONTRACT Civil Drafter	14. YEARS EXPERIENCE	
		a. TOTAL 16	b. WITH CURRENT FIRM 5


15. FIRM NAME AND LOCATION *City and State)*
 Germana Engineering and Associates, LLC Clermont, FL


16. EDUCATION <i>Degree and Specialization)</i> Seminole State College CAD II _ 1999 CAD I _ 1998 Engineering Graphics _ 1997	17. CURRENT PROFESSIONAL REGISTRATION <i>State and Discipline)</i> N/A
---	---

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


19. RELEVANT PROJECTS

	1) TITLE AND LOCATION <i>City and State)</i> Montverde Academy - Legacy Training Center Montverde, Florida	2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2022	CONSTRUCTION <i>If applicable)</i> 2023
3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm This project consists of a 2 story 123,995 SF building which includes 6 basketball / volleyball courts, locker rooms, office space, and a conference room. Scope includes Civil Engineering site related layout, grading, utilities, stormwater management, and construction phase services support.			

	1) TITLE AND LOCATION <i>City and State)</i> Sprouts Farmers Market - North Carolina Charlotte, North Carolina	2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2023	CONSTRUCTION <i>If applicable)</i> 2024
3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Conversion of an existing retail building to a new Sprouts Farmers Market. The Civil related renovation included utility modifications to support grocery store uses. Scope included Civil Engineering site related layout, grading, utilities, and construction phase services support.			

	1) TITLE AND LOCATION <i>City and State)</i> Montverde Academy Education Technology & Innovation Center Montverde, Florida	2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2023	CONSTRUCTION <i>If applicable)</i> 2024
3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm The Education Technology and Innovation Center renovated the existing library to a 3,200 SF cutting edge technology learning based facility. The center features technology areas including photography labs, electronic game spaces, production studio, 3-D model area, and virtual reality area. Scope included Civil Engineering site layout, grading, and construction phase services support. Project Cost \$1.1 Million			

	1) TITLE AND LOCATION <i>City and State)</i> The Fresh Market - Lakewood Ranch, Florida Manatee County, Florida	2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2023	CONSTRUCTION <i>If applicable)</i> 2024
3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Conversion of an existing retail building to a new Fresh Market. The Civil related renovation included store entrance conversion, and utility modifications to support a grocery store use. Scope included Civil Engineering related site related layout, grading, utilities, and construction phase services support.			

	1) TITLE AND LOCATION <i>City and State)</i> City of Minneola - Library Minneola, Florida	2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2023	CONSTRUCTION <i>If applicable)</i> 2024
3) BRIEF DESCRIPTION <i>Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm This project consisted of the renovation and conversion of 2 existing buildings to a 1 story 5,816 SF library which includes study rooms, meeting rooms, flex space and restrooms. Scope included Civil Engineering site related layout, grading, utilities, stormwater management and construction phase services support.			

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <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 1
21. TITLE AND LOCATION <i>(City and State)</i> Montverde Academy - Montverde Florida	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES 2011-2024	CONSTRUCTION <i>(If applicable)</i> 2024

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Montverde Academy	b. POINT OF CONTACT NAME Brad Long	c. POINT OF CONTACT TELEPHONE NUMBER (407) 469-2561, Ext 4201
--	--	---

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

For over 13 years Germana Engineering and Associates has provided Civil Engineering support for the Montverde Academy. This is a highly recognized and respected private K-12 school that was founded in 1912.

Our commitment to Montverde Academy has ranged through a variety of projects ranging from parking improvements, athletic expansion, to new start of the art buildings to serve the student population.

As part of the campus expansion we have worked on a variety of project for Montverde Academy

- American with Disability Act campus improvements
- Innovation Center
- Middle School Building Addition
- Master planning for the Campus
- Parking improvements
- Recreation Facility improvements and expansion
- Roadway Expansion
- Stormwater management master planning
- Upper School Building Addition

Since the school functions as a very active campus, well thought out coordination with the school administration staff and the contractor for the the safety and appropriate scheduling of the new projects is key. We provided Civil Engineering support on this important implementation for the campus improvements and redevelopment.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a. (1) FIRM NAME Germana Engineering and Associates	(2) FIRM LOCATION <i>(City and State)</i> Clermont, Florida	(3) ROLE Civil Engineering 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

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <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;">2</p>
21. TITLE AND LOCATION <i>(City and State)</i> Wesley Christian Academy - Clermont Florida	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES 2024	CONSTRUCTION <i>(If applicable)</i>

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Wesley Christian Academy	b. POINT OF CONTACT NAME Rob McCue	c. POINT OF CONTACT TELEPHONE NUMBER (352) 394-0191
--	---------------------------------------	--

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

Our firm provided civil engineering services for the Wesley Christian Academy's new 2-story building. This 2-story 24,820 SF school building features 17 classrooms and a pavilion. Previously this area was a parking lot, but we worked with both the academy and the City of Clermont to ensure that this building addition would not bring the academy's parking requirements out of compliance.

This project features approximately 17 feet of vertical drop from the existing right of way to the base of the hill where it meets an existing on-site drive aisle. Through a combination of retaining walls, drainage swales, and efficient grading we were able to propose a product that met both the academy's and the City of Clermont's needs. In addition to overall grading, one important requirement was a safe and ADA accessible path for the students walking between the main church building and the new classroom building. This was met through the use of ramps, hand rails, and striping.

In addition to the building, the site features a proposed pavilion at the base of the hill. Due to the staggering of elevation between the pavilion and building, a portion of the pavilion was located within the retaining wall footprint. This interesting design required iteration and coordination between civil, structural, and the architect.

This building addition for the Wesley Christian Academy was a great opportunity to work for a local academy that aims to provide their students with not only good facilities, but safe access to their classrooms.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Germana Engineering and Associates	(2) FIRM LOCATION <i>(City and State)</i> Clermont, Florida	(3) ROLE Civil Engineering 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

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <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
21. TITLE AND LOCATION <i>(City and State)</i> Orlando Health - Clermont Florida	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES 2011-2020	CONSTRUCTION <i>(If applicable)</i> 2020

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Orlando Health	b. POINT OF CONTACT NAME Paul Johns	c. POINT OF CONTACT TELEPHONE NUMBER (352) 394-4071, Ext 8120
------------------------------------	--	--

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

For over 10 years Germana Engineering and Associates has provided Civil Engineering support for the Orlando Health- South Lake Campus. The campus is located in Clermont which is one of the fastest growing cities in the state and expansion of the campus has been a critical item.

As part of the campus expansion we have worked on a variety of project for Orlando Health

- American with Disability Act campus improvements
- Medical offices
- Outpatient Surgery Center
- New hospital campus in Davenport
- Roadway Expansion
- Skilled Nursing Units
- Stormwater management master planning
- Master planning for the Campus

The Clermont campus is located on one of the highest points of the state and has over 150 feet of vertical grade change. This extreme variation in topography presents unique challenges with development and expansion projects. Such variation in elevation requires great care and consideration. We have creative Civil Engineering solutions that works seamlessly with the distinctive topography challenges.

One of the key items when working with topography constraints is to "work with the land" as much as possible. Allowing the proposed building and/or the proposed site to absorb the slope constraints is important when providing a well thought out project.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Germana Engineering and Associates	(2) FIRM LOCATION <i>(City and State)</i> Clermont, Florida	(3) ROLE Civil Engineering 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

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <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
21. TITLE AND LOCATION <i>(City and State)</i> Sports Medicine Institute - Clermont Florida	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES 2021	CONSTRUCTION <i>(If applicable)</i>

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER NFL 3, LLC.	b. POINT OF CONTACT NAME Dr. David Lucas	c. POINT OF CONTACT TELEPHONE NUMBER (352) 241-0508
---------------------------------	---	--

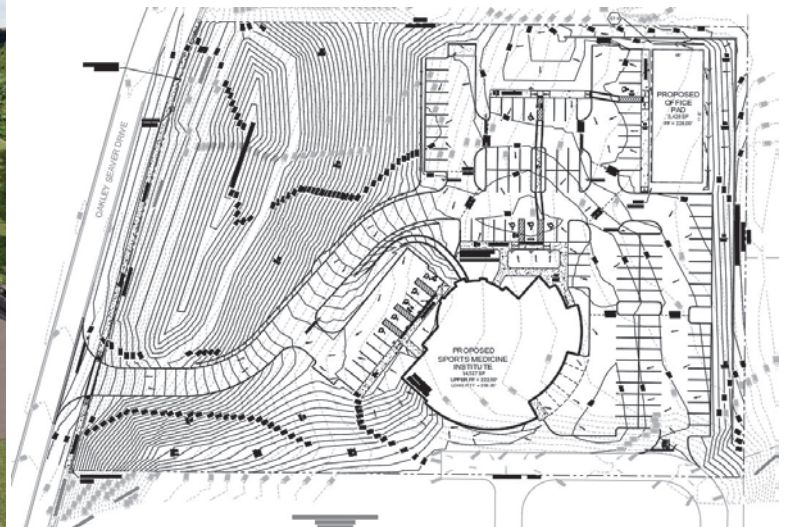
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

This 5.0 AC project proposed a unique 2-story 18,212 SF medical office and an additional 5,428 SF office pad.

The site features 53 feet of elevation change and is essentially a mostly flat hill top with a large drop to the Oakley Seaver Drive right of way. The firm's objectives during this project were to maximize the usable area at the "hill top" and to efficiently incorporate the unique architecture of the building, while also proposing a road connecting the site to Oakley Seaver Drive at the base of the hill. Also, the stormwater treatment needed to be on-site, adding to the site's complexity.

The firm was able to achieve these goals through the use of retaining walls, safety features such as guard rails, vehicular ramps, and grading. In addition, it was essential that the firm work closely with the architect due to the tiered design of the main Sports Medicine Institute building.

At the time, the estimated cost to produce this project was approximately 1.2 million dollars. Although the client decided they did not want to take this project to completion, the firm is confident that we maximized the end product by utilizing the site's existing grades.



Rendering prepared by Powell Studio Architecture

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
a. Germana Engineering and Associates	Clermont, Florida	Civil Engineering Consultant
b.		
c.		

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <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> Sprouts Farmers Market - Charlotte, North Carolina	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES 2023	CONSTRUCTION <i>(If applicable)</i> 2024

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Boos Development Group, Inc.	b. POINT OF CONTACT NAME Chris Moore	c. POINT OF CONTACT TELEPHONE NUMBER (704) 451-6112
--	---	--

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

Germana Engineering and Associates has assisted Sprouts Farmers Market in expanding to new stores and renovating existing stores. In this project an existing building was renovated into a Sprouts Farmers Market in Charlotte, North Carolina. We provided the Civil Engineering design and permitting for the project and also supported and coordinated with the Architects, Mechanical Engineers, and Structural Engineers.

The projects have been located in multiple states and cities where we seamlessly worked with local municipalities throughout the design, permitting, and construction implementation.

States where we provided Civil Engineering assistance for Sprouts Farmers Market include Florida, North Carolina, and South Carolina.

Each project was located in a different geographic location where each site had unique design challenges and different code requirements. Germana Engineering and Associates seamlessly worked with these design challenges and coordinated with other disciplines to achieve successful projects for Sprouts Farmers Market.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Germana Engineering and Associates	(2) FIRM LOCATION <i>(City and State)</i> Clermont, Florida	(3) ROLE Civil Engineering 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

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <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> Smith Road/Heron's Glen/Loucks Island - Mascotte, Florida	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES 2024	CONSTRUCTION <i>(If applicable)</i>

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER BL Flagship, LLC	b. POINT OF CONTACT NAME Tim Loucks	c. POINT OF CONTACT TELEPHONE NUMBER (407) 963-1036
---	---	---

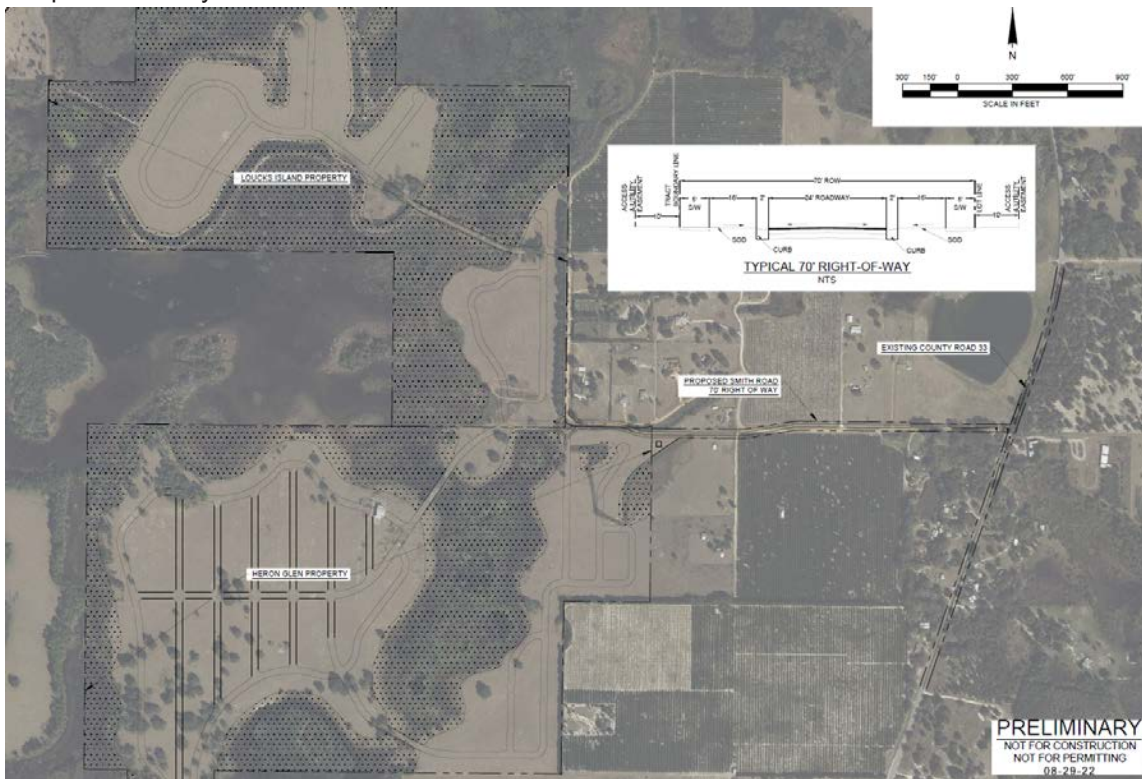
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

Development of a a 210 lot single family residential subdivision, a 710 lot single family residential subdivision with a planned 128 units of multi-family residential future phase and an approximately half mile roadway and utility extensions to service the projects.

Design includes master infrastructure including roadway, utilities and stormwater management system. Scope includes master planning, site layout, grading, utilities, stormwater and agency permitting.

Total area of the projects is roughly 450 acres with a total anticipated site development cost of over 32 million.

It is anticipated that this development will bring increase the population in the area by thousands and pave the way for additional development nearby.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Germana Engineering and Associates	(2) FIRM LOCATION <i>(City and State)</i> Clermont, Florida	(3) ROLE Civil Engineering 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

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <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> Nickelodeon Hotel - Kissimmee Florida	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES 2024	CONSTRUCTION <i>(If applicable)</i>

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER GMR Development Orlando I, LP	b. POINT OF CONTACT NAME Zafir Rashid	c. POINT OF CONTACT TELEPHONE NUMBER (647) 494-0303
--	---	---

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

The 10.11 AC Nickelodeon Hotel project features a unique and innovative 11-story hotel as well as a 3-story parking garage. This project is part of a 217 AC master development called Everest Place, which provides the stormwater treatment for the site.

In addition to the amenities in the hotel, the back-of-house area between the hotel and the master development wet pond will feature a lazy river, a pool, a wet playground, amphitheater, restrooms, and a small restaurant.

This project has required the coordination and integration of many different trades and firms. For example, some of the trades we have interfaced with are aquatic engineers, landscape architects, local architects, foreign architects, and civil engineers on the original master development. Our scope on this project includes but is not limited to, the placement of the hotel, garage and parking on the site, interfacing with the master development's roadway, drainage structures and utilities, and grading that serves and enhances the unique architecture of the hotel.

The hotel lobby is on the third floor, 22.66 feet above the first floor, requiring strategic use of pedestrian and vehicular ramps to maintain connectivity between the site and existing right-of-way.



Rendering prepared by GVA

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a. (1) FIRM NAME Germana Engineering and Associates	(2) FIRM LOCATION <i>(City and State)</i> Clermont, Florida	(3) ROLE Civil Engineering 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

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <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
21. TITLE AND LOCATION <i>(City and State)</i> Disney World - Lake Buena Vista, Florida	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES Varies	CONSTRUCTION <i>(If applicable)</i> Varies

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Varies	b. POINT OF CONTACT NAME Tommy Byerly, PE	c. POINT OF CONTACT TELEPHONE NUMBER (407) 832-9531
----------------------------	--	--

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

Since 2018 we have assisted Disney World Development of multiple projects throughout the Disney Work Resort property. Our projects expand to Magic Kingdom, EPCOT, Animal Kingdom, Hollywood Studios, multiple resort areas, and support infrastructure areas used by the cast members. Careful collaboration with Disney team stakeholders was an important part of each project. Some project required special design and coordination since they were in active guest areas in the theme parks and resort.

Our projects range from support buildings and infrastructure throughout all parks on various projects ranging from animal enclosures and habitats for Animal Kingdom, to food service support infrastructure for various parks, site improvements supporting theme park rides and renovations at guest resort areas.



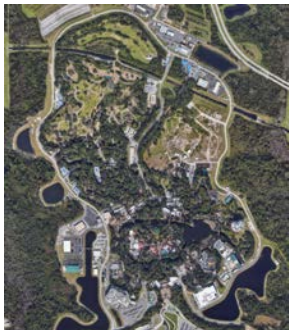
Magic Kingdom



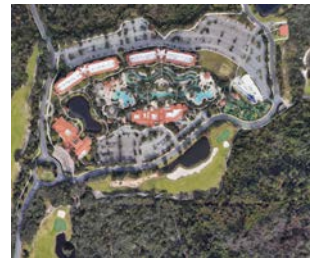
EPCOT



Hollywood Studios



Animal Kingdom



Disney Resorts

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Germana Engineering and Associates	(2) FIRM LOCATION <i>(City and State)</i> Clermont, Florida	(3) ROLE Civil Engineering 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

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <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;">9</p>
21. TITLE AND LOCATION <i>(City and State)</i> The Fresh Market - Multiple States/Cities	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES 2016	CONSTRUCTION <i>(If applicable)</i> 2016

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER The Fresh Market	b. POINT OF CONTACT NAME Tom Bowman	c. POINT OF CONTACT TELEPHONE NUMBER (336) 624-7059
--------------------------------------	--	--

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

Germana Engineering and Associates has assisted The Fresh Market for many years assisting them expanding to new stores and renovating existing stores. We provided the Civil Engineering design and permitting for multiple projects and also supported and coordinated with the Architects, Mechanical Engineers, and Structural Engineers.

The projects were located in multiple states and cities where we seamlessly worked with local municipalities throughout the design, permitting, and construction implementation.

States where we provided Civil Engineering assistance for The Fresh Market include Florida, Georgia, Louisiana, North Carolina, South Carolina, Texas, Tennessee, and Virginia

Each project was located in a different geographic location where each site had unique design challenges and different code requirements. Germana Engineering and Associates seamlessly worked with these design challenges to achieve successful projects for The Fresh Market.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Germana Engineering and Associates	(2) FIRM LOCATION <i>(City and State)</i> Clermont, Florida	(3) ROLE Civil Engineering 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

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <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;">10</p>
21. TITLE AND LOCATION <i>(City and State)</i> City of Minneola Library - Minneola Florida	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES 2023	CONSTRUCTION <i>(If applicable)</i> 2024

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER City of Minneola	b. POINT OF CONTACT NAME Mark Johnson	c. POINT OF CONTACT TELEPHONE NUMBER (352) 394-3598
--------------------------------------	--	--

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

This 1.45 AC project proposes a new SF library to serve the residents of The City of Minneola, Florida. In addition to the new building, several existing building were retrofitted to meet the site's needs.

As part of this project we worked with the city to create a site that is not only practical, but provides learning opportunities for residents. This includes landscaped open areas that facilitate workshops and other community events, and comfortable seating areas that encourage reading. Also, electric vehicle parking was integrated to accommodate that need in the community.

Civil scope on this project included site layout, grading, utilities, and stormwater management.



Rendering prepared by Powell Studio Architecture

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Germana Engineering and Associates	(2) FIRM LOCATION <i>(City and State)</i> Clermont, Florida	(3) ROLE Civil Engineering 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

H. ADDITIONAL INFORMATION

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

I. AUTHORIZED REPRESENTATIVE

The foregoing is a statement of facts.

31. SIGNATURE



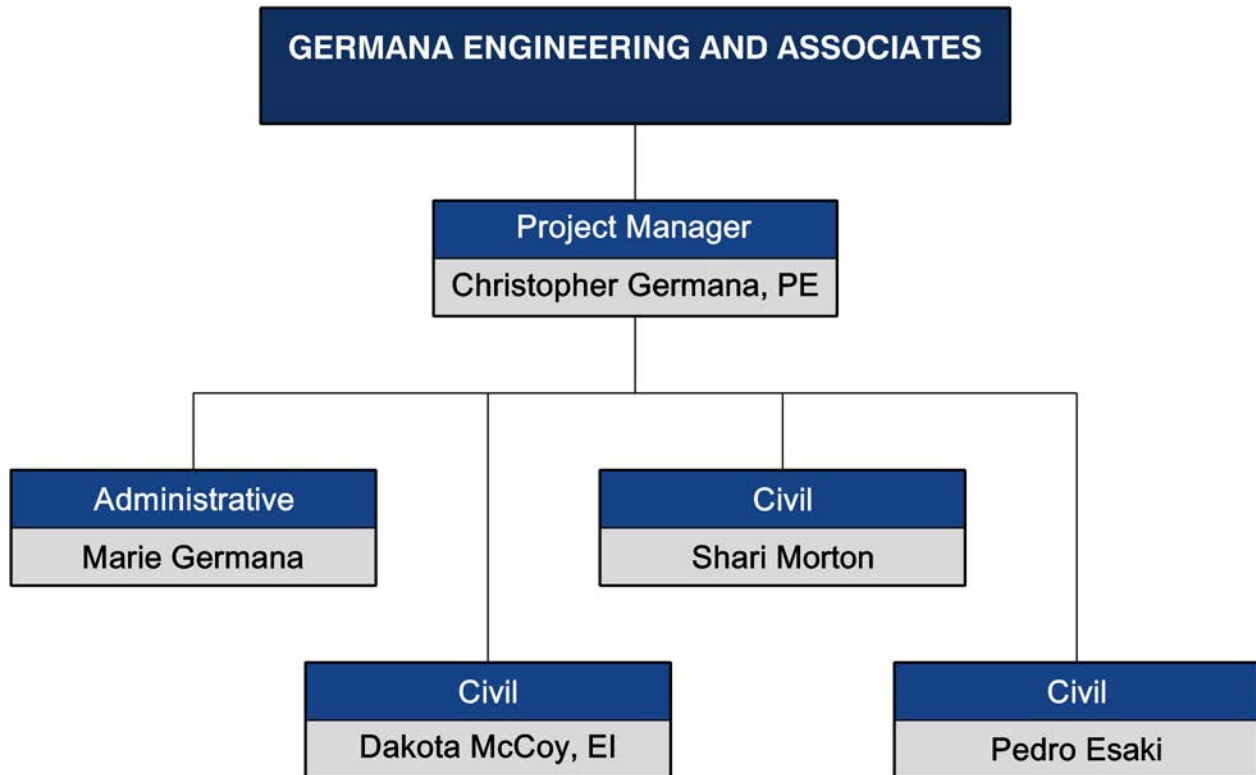
32. DATE

11/10/2025

33. NAME AND TITLE

Christopher Germana- Project Manager/ Civil Engineer

Organizational Chart



1900 Don Wickham Dr. | Clermont, FL 34711
(352) 394-4071

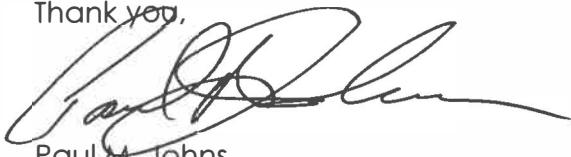
To Whom It May Concern:

I am pleased to recommend Christopher Germana and Germana Engineering & Associates. I have known Mr. Germana since 2012, during which time he has served as a Civil Engineering Consultant and provided timely and effective management of various hospital projects for Orlando Health. Mr. Germana is an excellent engineer that clearly understands team collaboration and communication.

Our unique Clermont campus is located on one of the highest points of the state and has over 150 feet of vertical grade change. This extreme variation in topography presents unique challenges with development and expansion projects. Such variation in elevation requires great care and consideration when developing. Mr. Germana has demonstrated these qualities by preparing creative Civil Engineering solutions that seamlessly work with our distinctive topography challenges.

Mr. Germana continually proves that he is a great asset to our organization and has our best interest in mind. He has collaborated with our administrative team and development team through both short-term and long-term vision plans for our campus. It is with great privilege that I give high recommendations for Christopher Germana. I am confident that anyone who works with Christopher will see he is committed to excellence, through a professional, and diligent manner.

Thank you,



Paul M. Johns
Assistant Vice President, Orlando Health
Chief Operations Officer, South Lake Hospital



June 25, 2024

To Whom It May Concern:

I am delighted to write this letter of recommendation for Christopher Germana and Germana Engineering & Associates. I have had the pleasure of knowing Mr. Germana for over 13 years and am well acquainted with his professional capabilities. Mr. Germana has served as a consultant for several significant projects across the Montverde Academy Campus from 2011 to the present day, consistently delivering exceptional service. He is a joy to collaborate with.

Mr. Germana possesses a meticulous attention to detail and, importantly, listens attentively to our project goals. He conducts himself with professionalism and a sincere dedication to achieving positive outcomes for his clients. Mr. Germana commands respect within his field and exemplifies the ethical standards of an outstanding professional engineer.

It is my privilege to offer my highest recommendation for Christopher Germana and Germana Engineering & Associates. I am confident that anyone who engages with Mr. Germana will appreciate his commitment to excellence, his professionalism, and his diligent work ethic.

Sincerely,

A handwritten signature in black ink, appearing to read "Brad Long", is positioned below the word "Sincerely,".

Brad Long

Director of Finance and Operations

July 9, 2024

To whom it may concern,

It is my pleasure to recommend Christopher Germana. I met Christopher as a Civil Engineering consultant in 2010 while working as the Director of Development for The Fresh Market. Christopher and his company Germana Engineering and Associates worked closely with our design team.

Christopher impressed us with his ability to understand what we needed, adapt to local jurisdictional requirements, and quickly model site concepts. Christopher was very responsive and always gave us excellent advice that served us well. His attention to detail on his plans set him apart from other consultants.

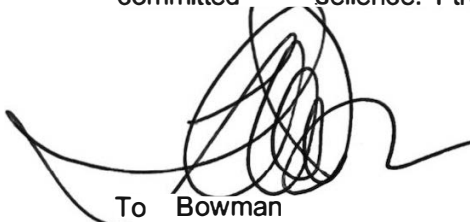
Christopher provided Civil Engineering services for The Fresh Market in multiple states and numerous cities. He seamlessly worked with local municipalities throughout the design, permitting, and construction phases of our projects. Christopher provided Civil Engineering support for The Fresh Market in the following states:

Florida	South Carolina
Georgia	Tennessee
Louisiana	Texas
North Carolina	Virginia

Each of our projects presented unique design and review/approval challenges, but Christopher's engineering experience, knowledge of the code, diligence, and his ability to connect with people and work with regulatory agencies during the permitting process kept our projects moving. His dedicated effort resulted in many successful projects for The Fresh Market.

Christopher and his team at Germana Engineering and Associates became an extension of The Fresh Market team by asking the right questions and providing quality, cost-efficient solutions. With both new ground-up stores and existing store renovations his design approach met our goals and objectives, ultimately ensuring successful projects.

I am confident that anyone who works with Christopher will find an engineer that is committed and diligent. I trust that he will be an asset to your program.



To Bowman
Former Director of Development
The Fresh Market

To whom this may concern:

Recommendation for Germana Engineering

June 17, 2013

I have known Christopher Germana for over 15 years in the local Civil Engineering community and throughout this time, Engineer Germana has proven a dynamic and well informed Civil Engineer.

Mr. Germana worked with me at Walt Disney World Architecture and Facilities Engineering in the late 1990's, where, as a senior intern, he conducted himself in a professional manner and quickly became an integral part of the design team. I relied on Christopher for technical support on numerous projects throughout the Walt Disney World property. Some projects included an environmental analysis at Discovery Island, utility analysis at Pleasure Island and the Magic Kingdom, new construction projects at Epcot, and structural evaluation for the monorail transportation system as well as condition survey and analysis of our iconic water bridges.

Christopher Germana's career branched out into the Civil Engineering consulting community where we have been in contact with each other over this time. I have the upmost respect for Christopher professionally and personally. His background in site engineering has proven a real asset in municipal and land development.

It is with great privilege that I give high recommendation for Christopher Germana. I am confident that anyone who works with Christopher will see he is committed to excellence, very professional, and diligent in his manner, and forthright in his work ethic.

Sincerely



Robert D Beaver PhD PE
Principal Engineer Senior – Design Assurance
Walt Disney Parks and Resorts Design & Engineering
3401 Vista Boulevard
Lake Buena Vista, Florida 32830



CITY OF CLERMONT

November 23, 2010

Germana Engineering and Associates
Mr. Christopher Germana, President

RE: CITY OF CLERMONT

On behalf of the City of Clermont, I would like to express our appreciation and respect to Mr. Chris Germana for his excellent service. The City of Clermont and Mr. Germana, in his role as the City's civil engineering consultant, have enjoyed a productive and effective working relationship for over 10 years. Mr. Germana has met or exceeded our expectations in his product, level of service and professionalism.

The City of Clermont experienced a rapid growth phase, so meeting the engineering demands of our expanding City has been challenging. Mr. Germana saw this challenge and handled our projects with the expediency and efficiency necessary to meet our rapidly changing demands. He has been sensitive to the budget requirements of the City and has worked to complete projects to our satisfaction with the available funds.

Mr. Germana managed and designed numerous projects for the City including new roadways that were critical to the City's transportation network, existing roadway reconstruction, drainage improvements including stormwater studies, new fire stations and streetscape improvements in historic downtown. His design approach is solid and he excels in working with the existing topography constraints in his design.

Christopher Germana has been a great asset to the City and to me, personally. I rely on Mr. Germana for advice and information on a variety of civil engineering issues and he is always forthcoming with his valuable assistance. It has been a pleasure working with Mr. Germana and I look forward to continuing our productive working relationship.

Sincerely,

Tamara Richardson, PE
Director of Engineering

September 9, 2009

TO WHOM IT MAY CONCERN:

Reference Letter for Mr. Christopher Germana, P.E.

I have worked with Mr. Germana on various County projects that he oversaw as a project manager for Kimley-Horn and Associates over the last twenty two months. The experience of working with Mr. Germana has been a very positive one, both professionally and personally.

Mr. Germana conducted himself in a very professional and dedicated manner in assisting me, the Sumter County Public Works Director, with several transportation and solid waste projects. His role in designing and permitting several road improvement projects for the County demonstrated that he was able to meet time-frame and project cost commitments in every case. He conducts himself as a gentleman and a person genuinely interested in a positive outcome for his client. Mr. Germana also successfully led a project team to analyze the County landfill operation regarding operational and capital costs and forecast tipping fee needs. Every major study and/or design project overseen by Mr. Germana for the County was ultimately approved by the Board of County Commissioners and has either been implemented or is in the process of being implemented at this time. His most recent accomplishment is a nearly \$1 million, three phased road rehabilitation and improvement project located in the Villages, approved by the Board of County Commissioners, and now under construction.

It is my opinion that Mr. Germana demonstrates in his behavior and his work ethics, the characteristics of an excellent professional engineer.

Sincerely,

A handwritten signature in black ink that reads "Gary W. Kuhl". The signature is written in a cursive, flowing style.

Gary W. Kuhl, P.E.

Director

Sumter County Public Works



September 18, 2011

RE: Letter of Reference for Christopher Germana, Civil Engineering Consultant

For several years Christopher Germana has provided Civil Engineering consulting for The Villages DRI on numerous residential, commercial, recreation, and roadway projects. He brings to the table a variety of skills, knowledge, and experience. The Villages projects were put on a tight schedule and budget. On every occasion Christopher worked with our schedule and budget and achieved our objective everytime.

It is evident that Christopher has the Clients best interest in mind and is truly evident by how he conducts himself and how he always sees things through. He has a team approach, dedicated to providing innovative solutions to all design challenges placed in front of him.

I'm confident that anyone Christopher works with, he will provide an equal commitment to excellence and professionalism.

Sincerely,

A handwritten signature in black ink that reads 'Gary Mark'. The signature is fluid and cursive, with a long, sweeping tail that extends to the right and then loops back down to the left.

Gary Mark
The Villages Director of Design

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT**

14D

**Loucks Island Community Development District
Request for Qualifications – District Engineering Services**

Competitive Selection Criteria

		Ability and Adequacy of Professional Personnel	Consultant’s Past Performance	Geographic Location	Willingness to Meet Time and Budget Requirements	Certified Minority Business Enterprise	Recent, Current and Projected Workloads	Volume of Work Previously Awarded to Consultant by District	TOTAL SCORE
	<i>weight factor</i>	25	25	20	15	5	5	5	100
	NAME OF RESPONDENT								
1	Alliant Engineering, Inc.								
2	Germana Engineering and Associates, LLC								

Board Member’s Signature

Date

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT**

15

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT**

15A

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT
Performance Measures/Standards & Annual Reporting Form
October 1, 2024 – September 30, 2025**

1. COMMUNITY COMMUNICATION AND ENGAGEMENT

Goal 1.1 Public Meetings Compliance

Objective: Hold at least two (2) regular Board of Supervisor meetings per year to conduct CDD related business and discuss community needs.

Measurement: Number of public board meetings held annually as evidenced by meeting minutes and legal advertisements.

Standard: A minimum of two (2) regular board meetings was held during the fiscal year.

Achieved: Yes No

Goal 1.2 Notice of Meetings Compliance

Objective: Provide public notice of each meeting at least seven days in advance, as specified in Section 190.007(1), using at least two communication methods.

Measurement: Timeliness and method of meeting notices as evidenced by posting to CDD website, publishing in local newspaper and via electronic communication.

Standard: 100% of meetings were advertised with 7 days' notice per statute on at least two mediums (i.e., newspaper, CDD website, electronic communications).

Achieved: Yes No Not Applicable

Goal 1.3 Access to Records Compliance

Objective: Ensure that meeting minutes and other public records are readily available and easily accessible to the public by completing monthly CDD website checks.

Measurement: Monthly website reviews will be completed to ensure meeting minutes and other public records are up to date as evidenced by District Management's records.

Standard: 100% of monthly website checks were completed by District Management.

Achieved: Yes No Not Applicable

2. INFRASTRUCTURE AND FACILITIES MAINTENANCE

Goal 2.1 District Infrastructure and Facilities Inspections

Objective: District Engineer will conduct an annual inspection of the District's infrastructure and related systems.

Measurement: A minimum of one (1) inspection completed per year as evidenced by district engineer's report related to district's infrastructure and related systems.

Standard: Minimum of one (1) inspection was completed in the Fiscal Year by the district's engineer.

Achieved: Yes No Not Applicable

NO INFRASTRUCTURE

3. FINANCIAL TRANSPARENCY AND ACCOUNTABILITY

Goal 3.1 Annual Budget Preparation

Objective: Prepare and approve the annual proposed budget by June 15 and final budget was adopted by September 30 each year.

Measurement: Proposed budget was approved by the Board before June 15 and final budget was adopted by September 30 as evidenced by meeting minutes and budget documents listed on CDD website and/or within district records.

Standard: 100% of budget approval and adoption were completed by the statutory deadlines and posted to the CDD website.

Achieved: Yes No Not Applicable

Goal 3.2 Financial Reports

Objective: Publish to the CDD website the most recent versions of the following documents: current fiscal year budget with any amendments, most recent financials within the latest agenda package; and annual audit via link to Florida Auditor General website.

Measurement: Previous years' budgets, financials and annual audit, are accessible to the public as evidenced by corresponding documents and link on the CDD's website.

Standard: CDD website contains 100% of the following information: most recent link to annual audit, most recently adopted/amended fiscal year budget, and most recent agenda package with updated financials.

Achieved: Yes No Not Applicable

Goal 3.3 Annual Financial Audit

Objective: Conduct an annual independent financial audit per statutory requirements, transmit to the State of Florida and publish corresponding link to Florida Auditor General Website on the CDD website for public inspection.

Measurement: Timeliness of audit completion and publication as evidenced by meeting minutes showing board approval and annual audit is transmitted to the State of Florida and available on the Florida Auditor General Website, for which a corresponding link is published on the CDD website.


Standard: Audit was completed by an independent auditing firm per statutory requirements and results were transmitted to the State of Florida and corresponding link to Florida Auditor General Website is published on CDD website.

Achieved: Yes No Not Applicable

no audit required



District Manager



Print Name



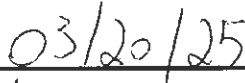
Date



Chair/Vice Chair, Board of Supervisors



Print Name



Date

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT**

15B

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT
Performance Measures/Standards & Annual Reporting Form
October 1, 2025 – September 30, 2026**

1. COMMUNITY COMMUNICATION AND ENGAGEMENT

Goal 1.1 Public Meetings Compliance

Objective: Hold at least two (2) regular Board of Supervisor meetings per year to conduct CDD related business and discuss community needs.

Measurement: Number of public board meetings held annually as evidenced by meeting minutes and legal advertisements.

Standard: A minimum of two (2) regular board meetings was held during the fiscal year.

Achieved: Yes No

Goal 1.2 Notice of Meetings Compliance

Objective: Provide public notice of each meeting at least seven days in advance, as specified in Section 190.007(1), using at least two communication methods.

Measurement: Timeliness and method of meeting notices as evidenced by posting to CDD website, publishing in local newspaper and via electronic communication.

Standard: 100% of meetings were advertised with 7 days' notice per statute on at least two mediums (i.e., newspaper, CDD website, electronic communications).

Achieved: Yes No

Goal 1.3 Access to Records Compliance

Objective: Ensure that meeting minutes and other public records are readily available and easily accessible to the public by

completing monthly CDD website checks.

Measurement: Monthly website reviews will be completed to ensure meeting minutes and other public records are up to date as evidenced by District Management's records.

Standard: 100% of monthly website checks were completed by District Management.

Achieved: Yes No

2. **INFRASTRUCTURE AND FACILITIES MAINTENANCE**

Goal 2.1 District Infrastructure and Facilities Inspections

Objective: District Engineer will conduct an annual inspection of the District's infrastructure and related systems.

Measurement: A minimum of one (1) inspection completed per year as evidenced by district engineer's report related to district's infrastructure and related systems.

Standard: Minimum of one (1) inspection was completed in the Fiscal Year by the district's engineer.

Achieved: Yes No

3. **FINANCIAL TRANSPARENCY AND ACCOUNTABILITY**

Goal 3.1 Annual Budget Preparation

Objective: Prepare and approve the annual proposed budget by June 15 and final budget was adopted by September 30 each year.

Measurement: Proposed budget was approved by the Board before June 15 and final budget was adopted by September 30 as evidenced by meeting minutes and budget documents listed on CDD website and/or within district records.

Standard: 100% of budget approval and adoption were completed by the statutory deadlines and posted to the CDD website.

Achieved: Yes No

Goal 3.2 Financial Reports

Objective: Publish to the CDD website the most recent versions of the following documents: current fiscal year budget with any amendments, most recent financials within the latest agenda package; and annual audit via link to Florida Auditor General website.

Measurement: Previous years' budgets, financials and annual audit, are accessible to the public as evidenced by corresponding documents and link on the CDD's website.

Standard: CDD website contains 100% of the following information: most recent link to annual audit, most recently adopted/amended fiscal year budget, and most recent agenda package with updated financials.

Achieved: Yes No

Goal 3.3 Annual Financial Audit

Objective: Conduct an annual independent financial audit per statutory requirements, transmit to the State of Florida and publish corresponding link to Florida Auditor General Website on the CDD website for public inspection.

Measurement: Timeliness of audit completion and publication as evidenced by meeting minutes showing board approval and annual audit is transmitted to the State of Florida and available on the Florida Auditor General Website, for which a corresponding link is published on the CDD website.

Standard: Audit was completed by an independent auditing firm per statutory requirements and results were transmitted to the State of Florida and corresponding link to Florida Auditor General Website is published on CDD website.

Achieved: Yes No

District Manager

Chair/Vice Chair, Board of Supervisors

Print Name

Print Name

Date

Date

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT**

**UNAUDITED
FINANCIAL
STATEMENTS**

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT
FINANCIAL STATEMENTS
UNAUDITED
FEBRUARY 28, 2026**

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT
BALANCE SHEET
GOVERNMENTAL FUNDS
FEBRUARY 28, 2026**

	General Fund	Debt Service Fund	Total Governmental Funds
	<u> </u>	<u> </u>	<u> </u>
ASSETS			
Cash	\$ 8,953	\$ -	\$ 8,953
Undeposited funds	4,684	-	4,684
Due from Landowner	-	5,121	5,121
Total assets	<u>13,637</u>	<u>5,121</u>	<u>18,758</u>
LIABILITIES AND FUND BALANCES			
Liabilities:			
Accounts payable	\$ 6,518	\$ 5,121	\$ 11,639
Due to Landowner	-	5,121	5,121
Accrued wages payable	200	-	200
Accrued taxes payable	45	-	45
Landowner advance	6,885	-	6,885
Total liabilities	<u>13,648</u>	<u>10,242</u>	<u>23,890</u>
Fund balances:			
Restricted for:			
Debt service	-	(5,121)	(5,121)
Unassigned	(11)	-	(11)
Total fund balances	<u>(11)</u>	<u>(5,121)</u>	<u>(5,132)</u>
Total liabilities, deferred inflows of resources and fund balances	<u>\$ 13,637</u>	<u>\$ 5,121</u>	<u>\$ 18,758</u>

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT
GENERAL FUND
STATEMENT OF REVENUES, EXPENDITURES,
AND CHANGES IN FUND BALANCES
FOR THE PERIOD ENDED FEBRUARY 28, 2026**

	<u>Current Month</u>	<u>Year to Date</u>	<u>Budget</u>	<u>% of Budget</u>
REVENUES				
Landowner contribution	\$ 6,742	\$ 18,460	\$ 94,090	20%
Total revenues	<u>6,742</u>	<u>18,460</u>	<u>94,090</u>	20%
EXPENDITURES				
Professional & administrative				
Supervisor	-	1,722	6,000	29%
Management/accounting/recording	2,000	10,000	48,000	21%
Legal	-	-	25,000	0%
Engineering	-	-	2,000	0%
Dissemination agent*	-	-	2,000	0%
Telephone	17	84	200	42%
Postage	-	-	500	0%
Printing & binding	42	208	500	42%
Legal advertising	-	368	1,500	25%
Annual special district fee	-	175	175	100%
Insurance	-	5,000	5,500	91%
Contingencies/bank charges	811	811	1,800	45%
Website hosting & maintenance	1,680	1,680	705	238%
Website ADA compliance	145	145	210	69%
Total expenditures	<u>4,695</u>	<u>20,193</u>	<u>94,090</u>	21%
Excess/(deficiency) of revenues over/(under) expenditures	2,047	(1,733)	-	
Fund balances - beginning	(2,058)	1,722	-	
Fund balances - ending	<u>\$ (11)</u>	<u>\$ (11)</u>	<u>\$ -</u>	

*These items will be realized when bonds are issued

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT
STATEMENT OF REVENUES, EXPENDITURES,
AND CHANGES IN FUND BALANCES
DEBT SERVICE FUND
FOR THE PERIOD ENDED FEBRUARY 28, 2026**

	Current Month	Year To Date
REVENUES	\$ -	\$ -
Total revenues	-	-
EXPENDITURES	-	-
Total expenditures	-	-
Excess/(deficiency) of revenues over/(under) expenditures	-	-
Fund balances - beginning	(5,121)	(5,121)
Fund balances - ending	\$ (5,121)	\$ (5,121)

**LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT**

MINUTES

DRAFT

**MINUTES OF MEETING
LOUCKS ISLAND
COMMUNITY DEVELOPMENT DISTRICT**

The Board of Supervisors of the Loucks Island Community Development District held Public Hearings and a Regular Meeting on June 12, 2025 at 12:00 p.m., at the City of Minneola City Hall, 800 N US Hwy 27, Minneola, Florida 34715.

Present:

Lane Register	Chair
Michelle Dudley	Vice Chair
Robert Hasse	Assistant Secretary
Melanie Minihan	Assistant Secretary
Rob Bonin	Assistant Secretary

Also present:

Daniel Rom	District Manager
Kristen Thomas (via telephone)	Wrathell, Hunt and Associates, LLC
Ashley Ligas (via telephone)	District Counsel
Christopher Germana	Interim District Engineer

FIRST ORDER OF BUSINESS

Call to Order/Roll Call

Mr. Rom called the meeting to order at 12:01 p.m. Mr. Rom noted that he administered the Oath of Office to Ms. Minihan and Mr. Bonin prior to the meeting.

All Supervisors were present.

SECOND ORDER OF BUSINESS

Public Comments

No members of the public spoke.

THIRD ORDER OF BUSINESS

Administration of Oath of Office to Supervisors Rob Bonin [Seat 1] and Melanie Minihan [Seat 5] (the following will be provided in a separate package)

This item was addressed during the First Order of Business.

A. Updates and Reminders: Ethics Training for Special District Supervisors and Form 1

41 Mr. Rom reminded the Supervisors about the ethics training requirement, which must
42 be completed by December 31, 2025. Newly appointed Supervisors are not required to
43 complete the requirement until December 31, 2026, unless they currently serve on other
44 Boards. The remaining items will be reviewed following the meeting.

45 **B. Membership, Obligations and Responsibilities**

46 **C. Guide to the Sunshine Amendment and Code of Ethics for Public Officers and**
47 **Employees**

48 **D. Form 8B: Memorandum of Voting Conflict for County, Municipal and other Local**
49 **Public Officers**

50

51 **FOURTH ORDER OF BUSINESS**

**Consideration of Resolution 2025-31,
Electing and Removing Officers of the
District and Providing for an Effective Date**

52

53

54

55 Mr. Rom presented Resolution 2025-31. Mr. Register nominated the following slate:

56 Chair Lane Register

57 Vice Chair Michelle Dudley

58 Assistant Secretary Robert Hasse

59 Assistant Secretary Melanie Minihan

60 Assistant Secretary Rob Bonin

61 No other nominations were made.

62 The following prior appointments by the Board remain unaffected by this Resolution:

63 Craig Wrathell Secretary

64 Daniel Rom Assistant Secretary

65 Kristen Thomas Assistant Secretary

66 Craig Wrathell Treasurer

67 Jeff Pinder Assistant Treasurer

68

69 **On MOTION by Mr. Register and seconded by Ms. Dudley, with all in favor,**
70 **Resolution 2025-31, Electing and Removing Officers of the District, as**
71 **nominated, and Providing for an Effective Date, was adopted.**

72

73

74 **FIFTH ORDER OF BUSINESS**

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

89 **A. Affidavit/Proof of Publication**

90 The affidavit of publication was included for informational purposes.

91 **B. Consideration of Resolution 2025-32, Expressing its Intent to Utilize the Uniform Method of Levying, Collecting, and Enforcing Non-Ad Valorem Assessments Which May Be Levied by the Loucks Island Community Development District in Accordance with Section 197.3632, Florida Statutes; Providing a Severability Clause; and Providing an Effective Date**

96 Mr. Rom presented Resolution 2025-32.

98 **On MOTION by Mr. Register and seconded by Ms. Dudley, with all in favor, the Public Hearing was opened.**

102 No affected property owners or members of the public spoke.

104 **On MOTION by Mr. Register and seconded by Ms. Dudley, with all in favor, the Public Hearing was closed.**

106 **On MOTION by Mr. Register and seconded by Ms. Dudley, with all in favor, Resolution 2025-32, Expressing its Intent to Utilize the Uniform Method of Levying, Collecting, and Enforcing Non-Ad Valorem Assessments Which May Be Levied by the Loucks Island Community Development District in Accordance with Section 197.3632, Florida Statutes; Providing a Severability Clause; and Providing an Effective Date, was adopted.**

113

114

115 **SIXTH ORDER OF BUSINESS**115 **Public Hearing to Consider the Adoption of**
116 **an Assessment Roll and the Imposition of**
117 **Special Assessments Relating to the**
118 **Financing and Securing of Certain Public**
119 **Improvements**

120

121 **A. Affidavit/Proof of Publication**122 **B. Mailed Notice to Property Owner(s)**

123 These items were included for informational purposes.

124 A Board Member questioned the methodology behind determining the maximum
125 annual bond assessments. Mr. Rom stated he will discuss it during Item 6D.126 **C. Engineer's Report (for informational purposes)**127 Mr. Rom stated the Engineer's Report dated March 2025 is unchanged since it was last
128 presented. Mr. Fisher is present to answer any questions.129 A Board Member noted that the Capital Improvement Plan (CIP) Cost Estimate Table
130 lists the CDD as the Ownership and Maintenance Entity for "Undergrounding of Conduit" but,
131 strictly speaking, that would be owned and maintained by the power and telecommunications
132 providers. It was noted that, while the Report indicates that the CDD may construct amenity
133 facilities, none are anticipated at this time.

134 There were no further comments or questions.

135 **D. Master Special Assessment Methodology Report (for informational purposes)**136 Mr. Rom stated the Master Special Assessment Methodology Report is unchanged since
137 it was last presented. He reviewed Table 3, on Page 14 of the Report, reflecting the Preliminary
138 Sources and Uses of Funds Table.139 Discussion ensued regarding the maximum annual bond assessments versus actuals, the
140 Coupon Rate, Costs of Issuance, Capitalized Interest, etc.

141 There were no further comments or questions.

142 **E. Consideration of Resolution 2025-33, Making Certain Findings; Authorizing a Capital**
143 **Improvement Plan; Adopting an Engineer's Report; Providing an Estimated Cost of**
144 **Improvements; Adopting an Assessment Report; Equalizing, Approving, Confirming**
145 **and Levying Debt Assessments; Addressing the Finalization of Special Assessments;**

146 **Addressing the Payment of Debt Assessments and the Method of Collection; Providing**
 147 **for the Allocation of Debt Assessments and True-Up Payments; Addressing**
 148 **Government Property, and Transfers of Property to Units of Local, State and Federal**
 149 **Government; Authorizing an Assessment Notice; and Providing for Severability,**
 150 **Conflicts and an Effective Date**

151 Mr. Rom presented Resolution 2025-33. There were no questions.

152

153 **On MOTION by Mr. Register and seconded by Ms. Dudley, with all in favor, the**
 154 **Public Hearing was opened.**

155

156

157 No affected property owners or members of the public spoke.

158

159 **On MOTION by Mr. Register and seconded by Ms. Dudley, with all in favor, the**
 160 **Public Hearing was closed.**

161

162

- 163 • **Hear testimony from the affected property owners as to the propriety and advisability**
 164 **of making the improvements and funding them with special assessments on the**
 165 **property.**

166 No affected property owners or members of the public spoke.

167

168 **On MOTION by Mr. Register and seconded by Ms. Dudley, with all in favor, the**
 169 **Public Hearing was closed.**

170

171

- 172 • **Thereafter, the governing authority shall meet as an equalizing board to hear any and**
 173 **all complaints as to the special assessments on a basis of justice and right.**

174 The Board, sitting as the Equalizing Board, had no questions and made no changes to
 175 the assessment levels.

176

177 **On MOTION by Mr. Register and seconded by Ms. Dudley, with all in favor,**
 178 **Resolution 2025-33, Making Certain Findings; Authorizing a Capital**
 179 **Improvement Plan; Adopting an Engineer’s Report; Providing an Estimated**
 180 **Cost of Improvements; Adopting an Assessment Report; Equalizing, Approving,**

181 **Confirming and Levying Debt Assessments; Addressing the Finalization of**
 182 **Special Assessments; Addressing the Payment of Debt Assessments and the**
 183 **Method of Collection; Providing for the Allocation of Debt Assessments and**
 184 **True-Up Payments; Addressing Government Property, and Transfers of**
 185 **Property to Units of Local, State and Federal Government; Authorizing an**
 186 **Assessment Notice; and Providing for Severability, Conflicts and an Effective**
 187 **Date, was adopted.**

188
 189
 190 **SEVENTH ORDER OF BUSINESS** **Public Hearing to Hear Public Comments**
 191 **and Objections to the Adoption of the**
 192 **Rules of Procedure, Pursuant to Sections**
 193 **120.54 and 190.035, Florida Statutes**
 194

195 **A. Affidavits of Publication**

196 The affidavits of publication were included for informational purposes.

197 **B. Consideration of Resolution 2025-34, Adopting Rules of Procedure; Providing a**
 198 **Severability Clause; and Providing an Effective Date**

199 **On MOTION by Mr. Register and seconded by Ms. Dudley, with all in favor, the**
 200 **Public Hearing was opened.**

201
 202
 203 No affected property owners or members of the public spoke.

205 **On MOTION by Mr. Register and seconded by Ms. Dudley, with all in favor, the**
 206 **Public Hearing was closed.**

208 **On MOTION by Mr. Register and seconded by Ms. Dudley, with all in favor,**
 209 **Resolution 2025-34, Adopting Rules of Procedure; Providing a Severability**
 210 **Clause; and Providing an Effective Date, was adopted.**

211
 212
 213 **EIGHTH ORDER OF BUSINESS** **Public Hearing on Adoption of Fiscal Year**
 214 **2024/2025 Budget**
 215

216 **A. Affidavit of Publication**

217 The affidavit of publication was included for informational purposes.

218 **B. Consideration of Resolution 2025-35, Relating to the Annual Appropriations and**
 219 **Adopting the Budget(s) for the Fiscal Year Beginning October 1, 2024, and Ending**

220 **September 30, 2025; Authorizing Budget Amendments; and Providing an Effective**
221 **Date**

222 Mr. Rom presented Resolution 2025-35. He noted that the proposed Fiscal Year 2025
223 budget is unchanged since it was last presented. This is a Landowner-funded budget with
224 expenses funded as they are incurred. A reduced monthly Management Fee of \$2,000 will be
225 billed until bonds are issued.

226 The following change was made to the proposed Fiscal Year 2025 budget:

227 Page 1: Delete "Meeting room rental" line item

228

229 **On MOTION by Mr. Register and seconded by Ms. Dudley, with all in favor, the**
230 **Public Hearing was opened.**

231

232

233 No affected property owners or members of the public spoke.

234

235 **On MOTION by Mr. Register and seconded by Ms. Dudley, with all in favor, the**
236 **Public Hearing was closed.**

237

238 **On MOTION by Mr. Register and seconded by Ms. Dudley, with all in favor,**
239 **Resolution 2025-35, Relating to the Annual Appropriations and Adopting the**
240 **Budget(s) for the Fiscal Year Beginning October 1, 2024, and Ending September**
241 **30, 2025, as amended; Authorizing Budget Amendments; and Providing an**
242 **Effective Date, was adopted.**

243

244

245 **NINTH ORDER OF BUSINESS**

**Public Hearing on Adoption of Fiscal Year
2025/2026 Budget**

246

247

248 **A. Affidavit of Publication**

249 Mr. Rom distributed the affidavit/proof of publication for informational purposes.

250 **B. Consideration of Resolution 2025-36, Relating to the Annual Appropriations and**
251 **Adopting the Budget(s) for the Fiscal Year Beginning October 1, 2025, and Ending**
252 **September 30, 2026; Authorizing Budget Amendments; and Providing an Effective**
253 **Date**

254 Mr. Rom presented Resolution 2025-36. He noted that the proposed Fiscal Year 2026
255 budget was adjusted to incorporate the potential bond issuance. This is a Landowner-funded
256 budget with expenses funded as they are incurred. A reduced monthly Management Fee of
257 \$2,000 will be billed until bonds are issued.

258 Discussion ensued regarding platting, bond issuance, when assessments will likely
259 transition to on roll, etc.

260 Mr. Rom will adjust the budget line items related to bond issuance such as the
261 Management Fee, etc., based on the potential timing of bond issuance.

262 The following change was made to the proposed Fiscal Year 2026 budget:

263 Page 1: Delete "Meeting room rental" line item
264

265 **On MOTION by Mr. Register and seconded by Ms. Dudley, with all in favor, the**
266 **Public Hearing was opened.**

267
268

269 No affected property owners or members of the public spoke.

270

271 **On MOTION by Mr. Register and seconded by Ms. Dudley, with all in favor, the**
272 **Public Hearing was closed.**

273

274 **On MOTION by Mr. Register and seconded by Ms. Dudley, with all in favor,**
275 **Resolution 2025-36, Relating to the Annual Appropriations and Adopting the**
276 **Budget(s) for the Fiscal Year Beginning October 1, 2025, and Ending September**
277 **30, 2026, as amended; Authorizing Budget Amendments; and Providing an**
278 **Effective Date, was adopted.**

279
280

281 **TENTH ORDER OF BUSINESS**

**Acceptance of Unaudited Financial
282 Statements as of April 30, 2025**

283

284 Mr. Rom presented the Unaudited Financial Statements as of April 30, 2025. He will
285 follow up on the funding requests. Ms. Minihan will be copied on correspondence.

286

287 **On MOTION by Mr. Register and seconded by Ms. Dudley, with all in favor, the**
288 **Unaudited Financial Statements as of April 30, 2025, were accepted.**

289

290
291
292
293
294
295
296
297
298
299
300
301
302
303
304
305
306
307
308
309
310
311
312
313
314
315
316
317
318
319
320
321
322
323

ELEVENTH ORDER OF BUSINESS **Approval of Minutes**

- A. **March 20, 2025 Landowners’ Meeting**
- B. **March 20, 2025 Organizational Meeting Minutes**

On MOTION by Mr. Register and seconded by Ms. Dudley, with all in favor, the March 20, 2025 Landowners’ Meeting Minutes and the March 20, 2025 Organizational Meeting Minutes, both as presented, were approved.

TWELFTH ORDER OF BUSINESS **Staff Reports**

- A. **District Counsel: Kutak Rock LLP**
- B. **District Engineer (Interim): Germana Engineering and Associates**
- C. **District Manager: Wrathell, Hunt and Associates, LLC**

There were no Staff reports.

- **NEXT MEETING DATE: July 10, 2025 at 12:00 PM**
 - **QUORUM CHECK**

The July 10, 2025 meeting will be canceled. It was noted that bonds will likely be issued in the first or second quarter of 2026. The bond validation hearing is scheduled for June 30, 2025.

THIRTEENTH ORDER OF BUSINESS **Board Members’ Comments/Requests**

There were no Board Members’ comments or requests.

FOURTEENTH ORDER OF BUSINESS **Public Comments**

No members of the public spoke.

FIFTEENTH ORDER OF BUSINESS **Adjournment**

On MOTION by Mr. Register and seconded by Ms. Dudley, with all in favor, the meeting adjourned at 12:24 pm.

324

325

326

327 _____
Secretary/Assistant Secretary

Chair/Vice Chair