

The Tree Amigos



The Tree Amigos

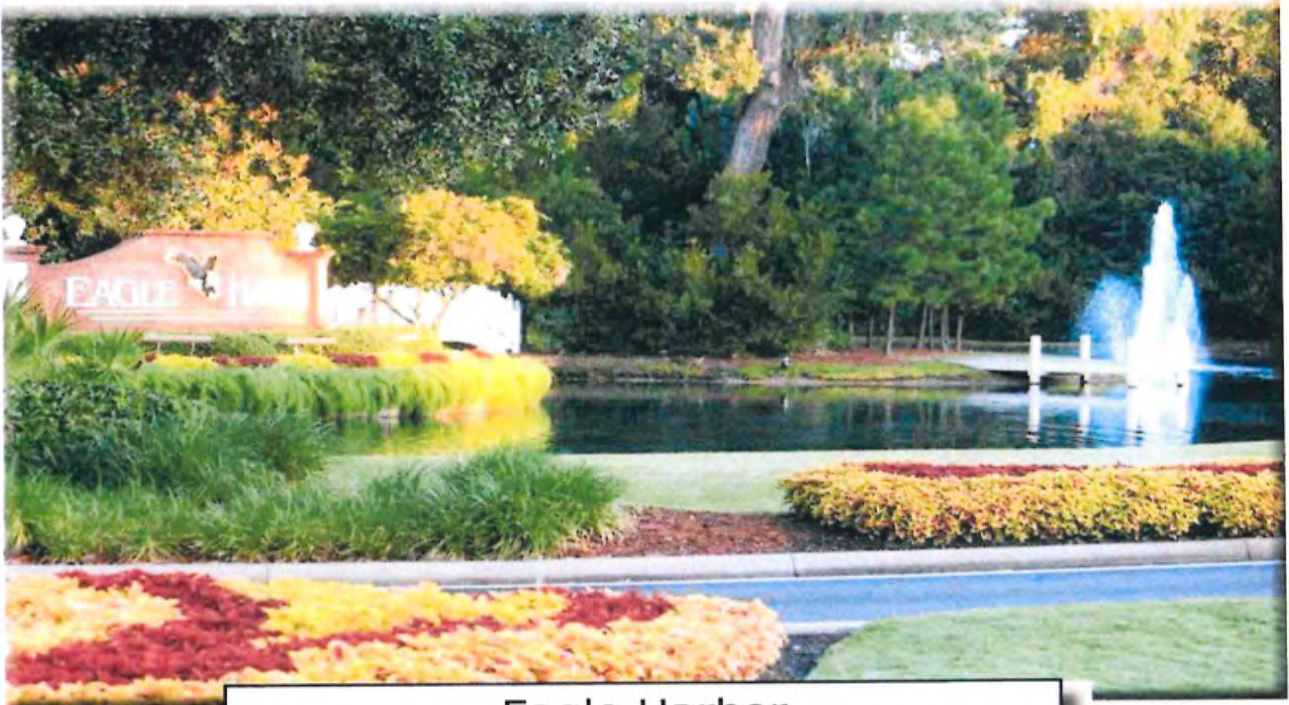


Working with Tree Amigos on numerous projects has been an outstanding experience. From the design process to the installation process, no detail was overlooked and expectations were exceeded and under budget.

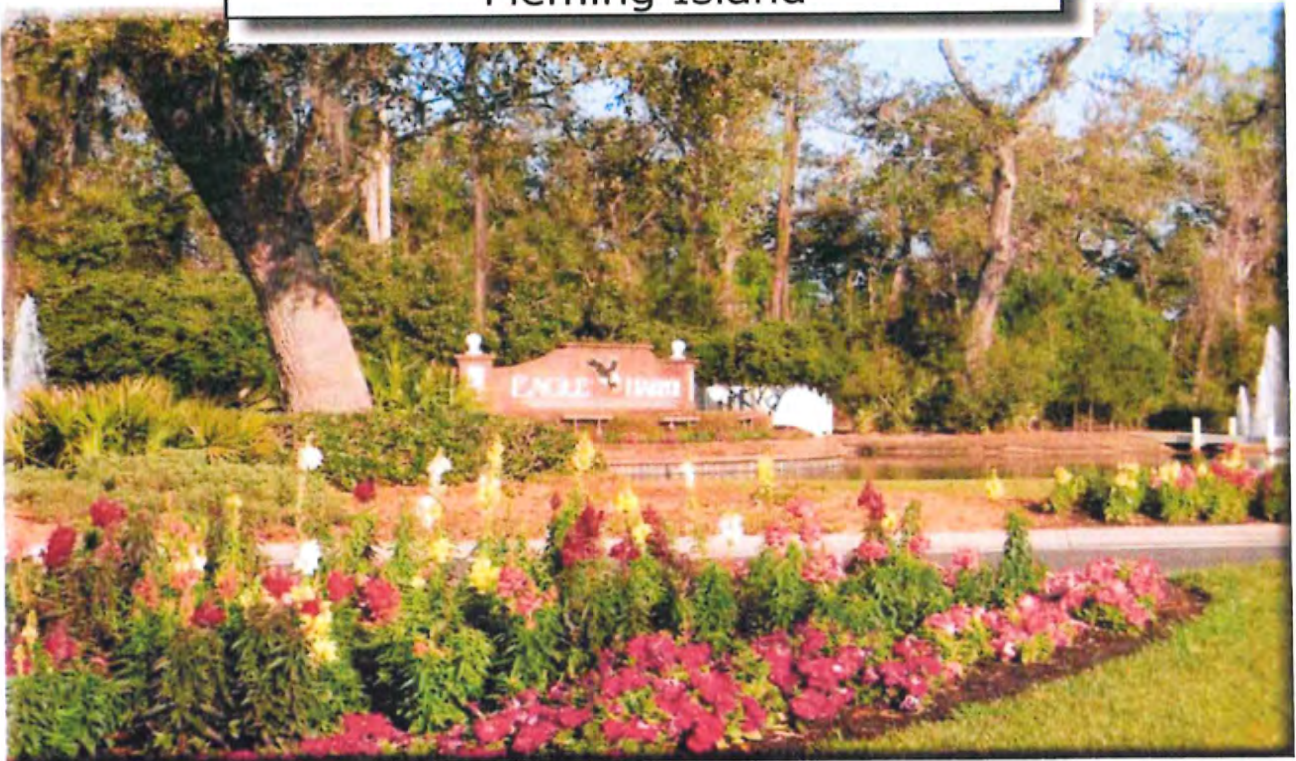
- **Steve Anderson**
Project Manager, Rolling Hills
(904) 509-6445



The Tree Amigos



Eagle Harbor
Fleming Island



The Tree Amigos



Jim Proctor and his crew are extremely knowledgeable in landscape design, installation, maintenance, and are always reliable and professional.

- **Steve Anderson**
Project Manager, Rolling Hills
(904) 509-6445





Proposal for Landscape Maintenance
Bartram Springs CDD

Presenters: Billy Genovese

Date: 01.18.2024

Bartram Springs CDD

14530 Cherry Lake Drive
Jacksonville, FL 32258



Dear Bartram Springs CDD Board,

Thank you for the opportunity to provide a proposal for your wonderful community. It has been a pleasure to serve as your landscape provider for the last 5 years. Along the way we have certainly experienced highs and lows in our partnership, but our ability to work together to remedy the situations and each year improve upon the landscaping inside the community makes us a great team. Our ultimate goal as a company is to provide the highest level of service possible and continue to make Bartram Springs one of the most sought-after communities in Duval County to live in. I know we have put you in good hands by assigning Bryan Wackes as your Account Manager. The knowledge, attention to detail, and work ethic he brings each day is second to none and I know the changes he has made in a short period of time are not going unnoticed. We have great momentum going with his addition and if given the opportunity we look forward to maintaining our partnership with Bartram Springs CDD for years to come.

Sincerely,

A handwritten signature in blue ink, appearing to read "Billy Genovese", with a long, sweeping underline.

Billy Genovese
Director of Business Development
386-225-0203
bgenovese@verdego.com

POWER OF ATTORNEY

Great Midwest Insurance Company

KNOW ALL MEN BY THESE PRESENTS, that GREAT MIDWEST INSURANCE COMPANY, a Texas Corporation, with its principal office in Houston, TX, does hereby constitute and appoint: Tyler D. DeBord, Stephen P. Farmer, Pamela J. Thompson

its true and lawful Attorney(s)-In-Fact to make, execute, seal and deliver for, and on its behalf as surety, any and all bonds, undertakings or other writings obligatory in nature of a bond.

This authority is made under and by the authority of a resolution which was passed by the Board of Directors of GREAT MIDWEST INSURANCE COMPANY, on the 1st day of October, 2018 as follows:

Resolved, that the President, or any officer, be and hereby is, authorized to appoint and empower any representative of the Company or other person or persons as Attorney-In-Fact to execute on behalf of the Company any bonds, undertakings, policies, contracts of indemnity or other writings obligatory in nature of a bond not to exceed Ten Million dollars (\$10,000,000.00), which the Company might execute through its duly elected officers, and affix the seal of the Company thereto. Any said execution of such documents by an Attorney-In-Fact shall be as binding upon the Company as if they had been duly executed and acknowledged by the regularly elected officers of the Company. Any Attorney-In-Fact, so appointed, may be removed in the Company's sole discretion and the authority so granted may be revoked as specified in the Power of Attorney.

Resolved, that the signature of the President and the seal of the Company may be affixed by facsimile on any power of attorney granted, and the signature of the Secretary, and the seal of the Company may be affixed by facsimile to any certificate of any such power and any such power or certificate bearing such facsimile signature and seal shall be valid and binding on the Company. Any such power so executed and sealed and certificate so executed and sealed shall, with respect to any bond of undertaking to which it is attached, continue to be valid and binding on the Company.

IN WITNESS THEREOF, GREAT MIDWEST INSURANCE COMPANY, has caused this instrument to be signed by its President, and its Corporate Seal to be affixed this 11th day of February, 2021.

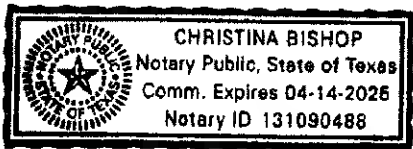


GREAT MIDWEST INSURANCE COMPANY

BY [Signature] Mark W. Haushill President

ACKNOWLEDGEMENT

On this 11th day of February, 2021, before me, personally came Mark W. Haushill to me known, who being duly sworn, did depose and say that he is the President of GREAT MIDWEST INSURANCE COMPANY, the corporation described in and which executed the above instrument; that he executed said instrument on behalf of the corporation by authority of his office under the By-laws of said corporation.



BY [Signature] Christina Bishop Notary Public

CERTIFICATE

I, the undersigned, Secretary of GREAT MIDWEST INSURANCE COMPANY, A Texas Insurance Company, DO HEREBY CERTIFY that the original Power of Attorney of which the foregoing is a true and correct copy, is in full force and effect and has not been revoked and the resolutions as set forth are now in force.

Signed and Sealed at Houston, TX this 27 Day of December, 20 23



BY [Signature] Leslie K. Shaunty Secretary

WARNING: Any person who knowingly and with intent to defraud any insurance company or other person, files and application for insurance of claim containing any materially false information, or conceals for the purpose of misleading, information concerning any fact material thereto, commits a fraudulent insurance act, which is a crime and subjects such person to criminal and civil penalties.

AIA Document 310 - 2010 Bid Bond

CONTRACTOR (Name, legal status and address):

Verdego, LLC
P.O. Box 789
Bunnell, FL 32110

SURETY (Name, legal status and principal place of business):

Great Midwest Insurance Company
800 Gessner Road, Suite 600
Houston, TX 77024

OWNER (Name, legal status and address):

Bartram Springs Community Development District
14530 Cherry Lake Drive East
Jacksonville, FL 32258

Bond Amount: **Twenty Five Thousand and 00/100 Dollars (\$25,000.00)**

PROJECT : (Name, location or address, and Project number, if any):

Landscape and Irrigation Maintenance Services

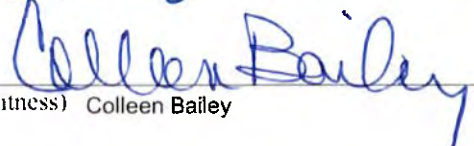
The Contractor and Surety are bound to the Owner in the amount set forth above, for the payment of which the Contractor and Surety bind themselves, their heirs, executors, administrators, successors and assigns, jointly and severally, as provided herein. The conditions of this Bond are such that if the Owner accepts the bid of the Contractor within the time specified in the bid documents, or within such time period as may be agreed to by the Owner and Contractor, and the Contractor either (1) enters in to a contract with the Owner in accordance with the terms of such bid, and gives such bond or bonds as may be specified in the bidding or Contract Documents, with a surety admitted in the jurisdiction of the Project and otherwise acceptable to the Owner, for the faithful performance of such Contract and for the prompt payment of labor and material furnished in the prosecution thereof; or (2) pays to the Owner the difference, not to exceed the amount of this Bond, between the amount specified in said bid and such larger amount for which the Owner may in good faith contract with another party to perform the work covered by said bid, then this obligation shall be null and void, otherwise to remain in full force and effect. The Surety hereby waives any notice of an agreement between the Owner and Contractor to extend the time in which the Owner may accept the bid. Waiver of notice by the Surety shall not apply to any extension exceeding sixty (60) days in the aggregate beyond the time for acceptance of bids specified in the bid documents, and the Owner and Contractor shall obtain the Surety's consent for an extension beyond sixty (60) days.

If this Bond is issued in connection with a subcontractor's bid to a Contractor, the term Contractor in this Bond shall be deemed to be Subcontractor and the term Owner shall be deemed by the Contractor.

When this Bond has been furnished to comply with a statutory or other legal requirement in the location of the Project, any provision in this Bond conflicting with said statutory or legal requirement shall be deemed deleted herefrom and provisions conforming to such statutory or other legal requirement shall be deemed incorporated herein. When so furnished, the intent is that this Bond shall be construed as a statutory bond and not as a common law bond.

Signed and sealed this 27 day of December, 2023


(Witness) _____ (Seal)


(Witness) Colleen Bailey (Seal)

Verdego, LLC
(Principal) _____ (Seal)


(Title) William Genovese, Dir. of Contract Development
Great Midwest Insurance Company


(Surety) _____
(Title) Tyler D. DeBore, Attorney-in-Fact

BARTRAM SPRINGS COMMUNITY DEVELOPMENT DISTRICT

**ACKNOWLEDGMENT OF RECEIPT OF DOCUMENTS
AND PROPOSAL SIGNATURE FORM**

This Proposal for landscape and irrigation maintenance services has been submitted on this 18 day of Jan., 2024 by VerdeGo LLC [company] whose business address is 3335 N. State Street, Bunnell, FL 32110, telephone number is 386-437-3122, fax number is _____, and electronic mail address is bgenovese@verdego.com

The undersigned acknowledges, by the below execution of this proposal, that all information provided herein has been provided in full and that such information is truthful and accurate. Proposer agrees through submission of this Proposal to honor all pricing information ninety (90) days from the date of the Proposal opening, and if awarded the contract on the basis of this Proposal, to enter into and execute the services contract in substantially the form included in the proposal documents.

Proposer understands that inclusion of false, deceptive or fraudulent statements on this proposal constitutes fraud; and, that Bartram Springs Community Development District (the "District") considers such action on the part of the Proposer to constitute good cause for denial, suspension or revocation of a proposal for work for the District.

Furthermore, the undersigned acknowledges receipt of the following addenda, the provisions of which have been included in this Request for Proposal.

Addendum No. 1 dated 12/29/23

Addendum No. 2 dated 1/9/24

Addendum No. 3 dated 1/12/24

Addendum No. _____ dated _____

Addendum No. _____ dated _____

The undersigned hereby authorize(s) and request(s) any person, firm or corporation to furnish any pertinent information requested by the District, or their authorized agents, deemed necessary to verify the statements made in this proposal or attachments hereto, or regarding the ability, standing and general reputation of the Proposer.

VerdeGo LLC
Name of Organization

By: 

This 18 day of Jan, ²⁰²⁴2023

By: William Genovese / Director of Business Development
Name and Title of Person Signing

(Apply Corporate Seal if filing as a Corporation)

State of Incorporation: FL

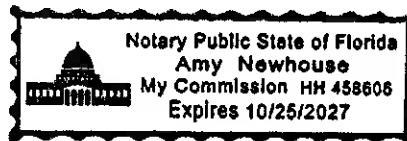
State of Florida

County of Duval

The foregoing instrument was acknowledged before me this 18 day of Jan, ²⁰²⁴2023, by William Genovese, of the VerdeGo LLC, who is personally known to me or who has produced Himself as identification and who did (did not) take an oath.



Signature of Notary taking acknowledgment



PROPOSAL FORM

FOR

LANDSCAPE AND IRRIGATION MAINTENANCE OPERATIONS

FOR

BARTRAM SPRINGS
COMMUNITY DEVELOPMENT DISTRICT

TO BE SUBMITTED TO:

BARTRAM SPRINGS
COMMUNITY DEVELOPMENT DISTRICT
c/o Governmental Management Services, LLC
475 West Town Place, Suite 114
St. Augustine, Florida 32092

on or before 10:00 a.m. EST, January 4, 2023

TO: Bartram Springs Community Development District

FROM: VerdeGo LLC
(Contractor)

In accordance with the Request for Proposals for Landscape and Irrigation Maintenance for Bartram Springs Community Development District, the undersigned proposes to conduct all Work necessary to provide complete Maintenance Operations as described in the Detailed Specifications and Maintenance Map.

All Proposals shall be in accordance with the project manual.

To: Bartram Springs Community Development District

Ladies and Gentlemen:

The undersigned, as Proposer, hereby declares (1) that the only person or persons interested in the Proposal, as principal or principals is or are names herein and that no other person than herein mentioned has any interest in the Proposal of the Contract to which the Work pertains, (2) that this Proposal is made without connection or arrangement with any other person, company, or parties making a Proposal and (3) that the Proposal is in all respects fair and made in good faith without collusion or fraud.

The Proposer further declares that he has examined the site of the Work; that he has made sufficient investigations to fully satisfy himself that such site is a correct and suitable one for this Work; and he assumes full responsibility therefore; that he has examined the Specifications for the Work and from his own experience or from professional advice that the Specifications are sufficient for the Work to be done and he has examined the other Contract Documents relating thereto, including the Notice to Contractors, Instructions to Proposer, Proposal, Agreement, General Conditions, Detailed Specifications and Maintenance Map and he has read all addenda prior to the opening of Proposals, and that he has satisfied himself fully, relative to all matters and conditions with respect to the Work to which this Proposal pertains.

The Proposer proposes and agrees, if this Proposal is accepted, to contract with the Owner in the form of contract specified, to furnish all necessary materials, all equipment, all necessary machinery, tools, apparatus, means of transportation, and labor necessary to complete the Work specified in the Proposal and the Agreement, and called for by the Detailed Specifications and Maintenance Map and in the manner specified.

Note: The proposal summary contained herein is merely illustrative of the minimum amount/quantity of Work to be performed under the Contract, in the case of any conflict between this schedule of Proposal items and the Contract Specifications, the Contract Specifications will prevail.

PER CONTRACT DOCUMENTS:

1. Certificate of insurance is enclosed with Proposal.
2. Proposal is for a one year term, with the option for four annual renewals thereafter.
3. Proposer certifies he has made a complete inspection of the site of the proposed work and fully understands and complies with the Instructions to Proposer.
4. The District reserves the right to add and delete individual items from the final Contract award and during the Contract term.
5. This Proposal covers all maintenance Work detailed in the general conditions, detailed specifications and Maintenance Map.

6. Proposal amount is \$ 195,925.00 for year one.
Written amount: One Hundred Ninety-Five Thousand Nine Hundred Twenty-Five Dollars

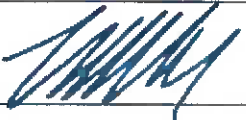
Renewal price is \$ 203,762.00 for year two.
Written amount: Two Hundred Three Thousand Seven Hundred Sixty-Two Dollars

Renewal price is \$ 209,875.00 for year three.
Written amount: Two Hundred Nine Thousand Eight Hundred Seventy-Five Dollars

Renewal price is \$ 216,175.00 for year four.
Written amount: Two Hundred Sixteen Thousand One Hundred Seventy-Five Dollars

Renewal price is \$ 222,660.00 for year five.
Written amount: Two Hundred Twenty-Two Thousand Six Hundred Sixty Dollars

Proposer: VerdeGo LLC

SIGNATURE: 

TITLE: President

ADDRESS: 3335 N. State Street
Bunnell, FL 32110

SIGNATURE: Alan Hall

TITLE: Vice President

ADDRESS: 3335 N. State Street
Bunnell, FL 32110

SIGNATURE: 

TITLE: Dir. of Business Development

ADDRESS: 3335 N. State Street
Bunnell, FL 32110

This form must be submitted with written proposal

**BARTRAM SPRINGS COMMUNITY DEVELOPMENT DISTRICT
LANDSCAPE AND IRRIGATION MAINTENANCE SERVICES**

UNIT PRICES

Please provide the following unit prices for the following items. Each unit price shall include all costs for complete, installed work including materials, labor, overhead and profit. All materials shall be Florida No. 1 or better.

SOD/SEED/MULCH:

Sodded Bermuda 419 Lawn, SF Per Pallet	\$ <u>695.00</u>
Sodded St. Augustine 'Floritam' Per Pallet	\$ <u>635.00</u>
Sodded Bahia Lawn, SF Per Pallet	\$ <u>475.00</u>
3" Deep Pine straw, SF Per Bale	\$ <u>8.00</u>
3" Deep Shredded Hardwood Mulch, SF Per Cubic Yard	\$ <u>60.00</u>

SHRUBS:

Daylily- 1 gal.	\$ <u>11.00</u>
Lantana - 1 gal.	\$ <u>11.50</u>
Parsons Juniper - 3 gal.	\$ <u>22.00</u>
Agapanthus - 3 gal.	\$ <u>31.00</u>
Loropetalum - 3 gal.	\$ <u>22.00</u>
Walters Viburnum - 3 gal.	\$ <u>26.50</u>
Muhly Grass - 3 gal.	\$ <u>22.00</u>

ANNUALS:

Annuals in 4" pots each	\$ <u>2.25 Installed</u>
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TREES (CONTAINER):

Crape Myrtle - 30 gal.	\$ <u>530.00</u>
Live Oak - 45 gal.	\$ <u>985.00</u>
Live Oak - 100 gal.	\$ <u>1,450.00</u>
Southern Magnolia - 30 gal.	\$ <u>450.00</u>
Red Cedar- 30 gal.	\$ <u>485.00</u>

**BARTRAM SPRINGS COMMUNITY DEVELOPMENT DISTRICT
LANDSCAPE AND IRRIGATION MAINTENANCE SERVICES/UNIT PRICES
(PLEASE PROVIDE ACCURATE PRICING)**

COST FOR ADDITIONAL MOWING

Lump Sum, Area #1	\$ <u>40.00</u>
Lump Sum Bahia, Area #2	\$ <u>60.00</u>
Lump Sum Bahia, Area #3	\$ <u>40.00</u>

COST FOR ONE TIME ADDITIONAL POND MOWING

Lump Sum Bahia on Pond # 2	\$ <u>40.00</u>
Lump Sum Bahia on Pond # 4	\$ <u>60.00</u>
Lump Sum Bahia on Pond # 5	\$ <u>40.00</u>
Lump Sum Bahia on Pond # 6	\$ <u>40.00</u>
Lump Sum Bahia on Pond # 7	\$ <u>60.00</u>
Lump Sum Bahia on Pond # 10	\$ <u>60.00</u>
Lump Sum Bahia on Pond # 14	\$ <u>80.00</u>
Lump Sum Bahia on Pond # 16	\$ <u>80.00</u>
Lump Sum Bahia on Pond # 17	\$ <u>60.00</u>
Lump Sum Bahia on Pond # 20	\$ <u>40.00</u>
Lump Sum Bahia on Pond # 21	\$ <u>60.00</u>
Lump Sum Bahia on Pond # 22	\$ <u>40.00</u>
Lump Sum Bahia on Pond # 25	\$ <u>30.00</u>
Lump Sum Bahia on Pond #26	\$ <u>60.00</u>

COST FOR ONE TIME DRAINAGE EASEMENT ROUGH MOWING (RED AREAS ON MAP)

Lump Sum Drainage Easement # D 1	\$ <u>40.00</u>
Lump Sum Drainage Easement # D 2	\$ <u>40.00</u>
Lump Sum Drainage Easement # D 3	\$ <u>40.00</u>
Lump Sum Drainage Easement # D 4	\$ <u>40.00</u>

COST FOR BERMUDA TURF AERIFICATION

Aerification for both Bermuda Sports Fields	\$ <u>1,500.00</u>
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COST TO OVERSEED BERMUDA SPORTS FIELDS

Overseeding for both Bermuda Sports Fields at a rate of 8 pounds of Rye Seed per 1000sqft \$ 6,500.00

Refer to Detailed Specifications on Mulch removal.

MULCH REMOVAL Cost

Amenity Facility
Pool area and building \$ 2,400.00
Parking lot \$ 1,920.00

Entry
Entry thru Everest curb cut including median \$ 4,200.00

Center Medians
Everest to School Curb Cut \$ 3,800.00
School to Ginnie Springs Rd. \$ 2,400.00
Ginnie Springs Rd. to Charry Lake Dr. \$ 1,250.00

PALM SERVICES (PER LANDSCAPE SPECS)

Lump Sum Prune (Total Palms) \$ 4,390.00

Lump Sum Fungicide/Insecticide/Fertilize (Total Palms) \$ 3,380.00 per application

Please provide unit prices for routine maintenance repair and replacement of the following items. Each unit price shall include costs for complete, installed work including materials, labor, overhead and profit.

CONTROLLER:

*These are discontinued

Rain Bird ESTP-32MC \$ _____
Rain Bird ESP-24 \$ _____

*Average cost of controller replacement is \$1,000.00 - 1,700.00 depending on zone size, 2 wire system or conventional.

VALVE:

Rain Bird PGA/50 \$ 165.00

Heads: Rainbird or Hunter

Rotor \$ 25.00
Pop up 6" \$ 13.00
Pop up 12" \$ 19.00

WIRE:

14-1 Red Ft. \$.25
14-1 White Ft. \$.60
Wire Splice 3MDBR EA \$ 8.00

PIPE:

3" PR - 160, LF \$ 8.25
2-1/2" PR - 160, LF \$ 7.15
2" PR - 160, LF \$ 6.35

1-1/2" PR - 160, LF	\$ 5.15
1-1/4" PR - 160, LF	\$ 5.05
1" CL - 200, LF	\$ 1.75
3/4" CL - 200, LF	\$ 1.35
1/2" PR - 315, LF	\$ 1.35

MISCELLANEOUS:

1/2" Flex PVC	\$ 2.00
3/4" Flex PVC	\$ 3.00

SLIP-FIX REPAIR COUPLING:

3", EA	\$ 125.00
2-1/2", EA	\$ 90.00
2", EA	\$ 80.00
1-1/2", EA	\$ 60.00
1-1/4", EA	\$ 57.00
1", EA	\$ 45.00
3/4", EA	\$ 40.00
1/2", EA	\$ 35.00

PLEASE PROVIDE HOURLY RATES FOR THE FOLLOWING ITEMS:

A. Mowers	\$ 65.00	Acre
B. Bush-Hog	\$ 165.00	Hour
C. Tractor	\$ 175.00	Hour
D. Supervisor with Transportation	\$ 60.00	Hour
E. Laborer with hand equipment	\$ 45.00	Hour
F. Truck	\$ 100.00	Hour
G. Irrigation Tech labor rate	\$ 65.00	Hour

6. Contractor's Qualification Statement

**BARTRAM SPRINGS
COMMUNITY DEVELOPMENT DISTRICT**

**CONTRACTOR'S QUALIFICATION STATEMENT
Landscape and Irrigation Maintenance Services**

VerdeGo LLC

Contractor

TABLE OF CONTENTS

CONTRACTOR QUALIFICATION STATEMENT

CORPORATE OFFICERS

SUPERVISORY PERSONNEL

COMPANY OWNED MAJOR EQUIPMENT

STATUS OF CONTRACTS ON HAND

ALL PROJECTS PROPOSER COMPLETED IN LAST TWO YEARS

AFFIDAVIT FOR INDIVIDUAL

AFFIDAVIT FOR PARTNERSHIP

AFFIDAVIT FOR CORPORATION

SWORN STATEMENT PURSUANT TO CHAPTER 287, FLORIDA STATUTES, ON
INTEGRITY OF PUBLIC CONTRACTING AND PURCHASING

**BARTRAM SPRINGS COMMUNITY DEVELOPMENT DISTRICT
CONTRACTOR QUALIFICATION STATEMENT**

DATE SUBMITTED: Jan. 18, 2024, 2023

1. Proposer: VerdeGo LLC X Limited Liability Corp
 [Company Name] / / A Partnership
 / / A Corporation
 / / A Subsidiary Corporation

2. Parent Company Name Heartland LLC

3. Parent Company Address:

Street Address 1200 Main St 42nd Floor

P.O. Box (if any) _____

City Kansas City State MO Zip Code 64105

Telephone (816) 683-8698 Fax no. _____

1st Contact Name _____ Title _____

2nd Contact Name _____ Title _____

4. Proposer Company Address (if different):

Street Address 3335 N. State Street

P. O. Box (if any) _____

City Bunnell State Florida Zip Code 32110

Telephone 386-437-3122 Fax no. _____

1st Contact Name Paul Lukert Title Branch Manager

2nd Contact Name Bryan Wackes Title Account manager

5. List the location of the office from which the proposer would perform work for the Bartram Springs Community Development District.

Street Address 6200 State Road 13

City St. Augustine State Florida Zip Code 32092

Telephone 904-797-7474 Fax No. _____

1st Contract Name Paul Lukert Title Branch Manager

6. Is the Proposer incorporated in the State of Florida? yes (X) no ()

6.1 If yes, provide the following:

o Is the Company in good standing with the Florida Department of State, Division of Corporations? yes (X) no ()

If no, please explain _____

o Date incorporated 3/1/2010 FEIN: 27-4398666
Charter No. _____

6.2 If no, provide the following:

o The State with whom the Proposer company is incorporated? _____

o Is the company in good standing with the State? yes () no ()

In no, please explain _____

o Date incorporated _____ Charter No. _____

o Is the Proposer company authorized to do business in the State of Florida? yes () no ()

7. Is the Proposer company a registered or licensed contractor with the State of Florida? yes (X) no ()

7.1 If yes, provide the following:

o Type of registration (i.e. certified general contractor, certified electrical contractor, etc.) General Contractor

o License No. CGC1506752 Expiration Date 8/31/24

o Qualifying individual Terry McNitt Title President

o List company(s) currently qualified under this license VerdeGo LLC

7.2 Is the Proposer company a registered or licensed Contractor with Duval County? yes (X) no ()

7.3 Has the Proposer company performed work for a community development district previously? yes (X) no ()

8. List the Proposer's total annual dollar value of work completed for each of the last three (3) years starting with the latest year and ending with the most current year (2020) 22,000,000, (2021) 27,500,000, (2022) 27,000,000.

9. What are the Proposer's current insurance limits?

General Liability \$ 1,000,000
 Automobile Liability \$ 5,000,000
 Workers Compensation \$ 1,000,000
 Expiration Date 10/1/24

10. Has the Proposer been cited by OSHA for any job site or company office/shop safety violations in the past two years? yes () no ()

If yes, please describe each violation, fine, and resolution _____

11. Please state whether or not the Proposer or any of its affiliates are presently barred or suspended from bidding or contracting on any state, local, or federal-aid contracts in any state(s)? Yes _____ No _____ If so, state the name(s) of the company(ies) _____

the state(s) where barred or suspended _____
 state the period(s) of debarment or suspension _____

12. What is the landscape and irrigation maintenance experience of the proposed superintendent and project manager?

INDIVIDUAL'S NAME	PRESENT POSITION OR OFFICE	MAGNITUDE AND TYPE OF WORK	YEARS OF LANDSCAPE AND IRRIGATION MAINTENANCE EXPERIENCE	YEARS WITH FIRM	IN WHAT CAPACITY?
Paul Lukert	Branch Manager				
Bryan Wackes	Account Manager				

13. Has the Proposer ever failed to complete any work awarded to it? Yes _____ No _____
 If so, where and why? _____

14. Has any officer or partner of the Proposer ever been an officer, partner, or owner of some other organization that has failed to complete a landscape and irrigation maintenance contract?

Yes _____ No X If so, state name of individual, other organization and reason therefore. _____

15. List any and all litigation to which the Proposer has been a party in the last five (5) years.
N/A

16. Has the Proposer or any of its affiliates ever been either disqualified or denied prequalification status by a governmental entity? No If so, discuss the circumstances surrounding such denial or disqualification as well as the date thereof. _____

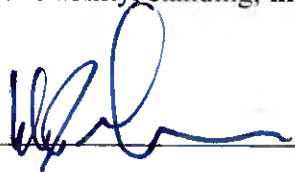
17. Within the past five (5) years, has the Proposer failed to complete a project within the scheduled contract time? No If so, discuss the circumstances surrounding such failure to complete a project on time as well as the date thereof. _____

18. Please state whether or not the Proposer has completed background checks on all of its employees who will or may be providing services at the Bartram Springs Community Development District? Yes X No _____ If no, please state the date by which the Proposer will assure to the District the completion of such background check.

[CONTINUED ON FOLLOWING PAGE]

The undersigned hereby authorize(s) and request(s) any person, firm or corporation to furnish any pertinent information requested by the Bartram Springs Community Development District or their authorized agents, deemed necessary to verify the statements made in this document or documents attached hereto, or necessary to determine whether the Bartram Springs Community Development District should qualify the Proposer for bidding on its landscape and irrigation maintenance project, including such matters as the Proposer's ability, standing, integrity, quality of performance, efficiency and general reputation

VerdeGo LLC
Name of Proposer

By: 

William Genovese / Dir. of Business Development
[Type Name and Title of Person Signing]

This 18 day of Jan., ²⁰²⁴2023.

(Corporate Seal)

Sworn to before me this 18 day of Jan., ²⁰²⁴2023.



(Seal)



Notary Public/Expiration Date

CORPORATE OFFICERS

Company Name VerdeGo LLC

Date 1/18/24

Provide the following information for Officers of the Proposer and parent company, if any.

NAME FOR PROPOSER	POSITION OR TITLE	CORPORATE RESPONSIBILITIES	INDIVIDUAL'S RESIDENCE CITY, STATE
TJ McNitt	President	Oversees all divisions	Flagler Beach, FL
Alan Hall	V.P. of Operations	Oversees Finances for all divisions	Ormond Beach, FL
Bruno Perez	Dir. of Operations	Manages the staff of our 3 Maintenance Locations	Palm Coast, FL
Billy Genovese	Dir. of Business Development	Sales	Jacksonville, FL
FOR PARENT COMPANY (if applicable)			

COMPANY OWNED MAJOR EQUIPMENT
 (Attach additional sheets if necessary)

Company Name VerdeGo LLC

Date _____

QUANTITY	DESCRIPTION	CAPACITY	NO. LOCATED IN	
			FLORIDA	OTHER
	See Attached			

2016 Ford F150
 2019 Ford Expedition
 1987 Frue #T-117
 1995 GDAN #T-119
 Trailer, 2005 Anderson #T101
 Trailer, 2005 Anderson 6ton #T107
 Trailer, 2006 Imperial #T128
 Trailer, 2007 Anderson T102
 Trailer, 2007 Imperial #T129
 Trailer, 2012 Anderson #T108
 Trailer, 2013 Anderson #T105
 Trailer, 2013 Anderson #T106
 Trailer, 2015 Big Tex #T104
 Trailer, 2015 Big Tex Utility #T110
 Trailer, 2016 Big Tex #T112
 Trailer, 2016 Water Tank Trailer #T103
 Trailer, 2017 Anvil #T109
 Trailer, 2017 Anvil #T111
 Trailer, 2018 - 6 ton #T115
 Trailer, 2018 Anvil #T114
 Trailer, 2018 Anvil #T116
 Trailer, 2018 Anvil Car Hauler #T113
 Trailer, 2018 Down2Earth #T134
 Trailer, 2019 Anvil #T120
 Trailer, 2019 Anvil #T121
 2019 Anvil #T136
 Trailer, 2019 Anvil Trailer #T130
 Trailer, 2019 Black 7x12 #T123
 Trailer, 2019 Down2Earth #T133
 Trailer, 2019 Down2Earth #T135
 Trailer, 2019 Down2Earth #T137
 Trailer, 2019 Down2Earth #T138
 Trailer, 2019 Down2Earth #T139
 Trailer, 2019 Down2Earth 82"x16" #T131
 Trailer, 2019 Down2Earth 82"x16" #T132
 Trailer, 2019 NVAE #T124
 Trailer, 2019 NVAE #T125
 Trailer, 2019 Tandem #T122
 Trailer, 2020 Cargo Trailer #T140
 Trailer, 2020 Cargo Trailer #T141
 Trailer, 2020 Cargo Trailer #T142
 Trailer, 2020 Cargo Trailer #T143
 Trailer, 2020 Tandem Trailer #T144
 Truck, 2005 Chevy C4500 #2043
 Truck, 2005 Ford F350 #2016
 Equip, 20' Dry Container
 Equip, 20' Dry Container Trailer,
 Equip, 20' Dry Container Trailer,
 Equip, 20' Dry Container
 Equip, 20' Dry Van Container
 Equip, 20' Dry Van Container
 Equip, 2012 Cat Skid Steer Loader #K9339
 Equip, 2012 Toro Skidsteer #00164
 Equip, 2014 EZ Trench Ground Saw #00439
 Equip, 2016 Buffalo Turbin Blower #25141
 Equip, 2016 CAT 262D Skid Steer #04916
 Equip, 2016 EZGO Terrain #85862
 Equip, 2016 EZGO Terrain #86108
 Equip, 2017 Billy Goat Sod Cutter 16010
 Equip, 2017 Kubota #18740
 Equip, 2017 Kubota UTV 4WD #43247
 Equip, 2017 Toro Trencher #00325
 Equip, 2018 Caterpillar 257D #02659
 Equip, 2018 Caterpillar 259D #15103
 Equip, 2018 Caterpillar 259D #15703
 Equip, 2019 Kubota #26247
 Equip, 60" Lazer E #99438
 Equip, BG Force Wheel Blower #18081
 Equip, BG Force Wheel Blower #1817
 Equip, Billy Goat Vac Trailer,
 Equip, Blade Belt Grinder
 Equip, Buffalo Turbine Blower
 Equip, Buffalo Turbine Cyclone Blower
 Equip, Buffalo Turbine Cyclone Blower
 Equip, Buffalo Turbine Cyclone Blower
 Equip, Buffalo Turbine Model Cyclone #29634
 Equip, CAT 242 Skid Steer Loader #00844
 Equip, CAT 257 D #2732
 Equip, CAT Excavator #03948
 Equip, Cat Skid Steer Loader - #00841
 Equip, CAT Skid Steer Loader #06221
 Equip, Debris Loader
 Equip, Earth Auger
 Equip, Exmark Mower (split Between.....)
 Equip, Exmark Mower (split Between.....)
 Equip, Golf Cart - Rivertown
 Equip, Kawaski Engine #69162
 Equip, Kohler Command Pro Blower #29370
 Equip, Kubota RTV #25489
 Equip, Kubota RTV #27413

Truck, 2005 Isuzu NPR #2060	Equip, Kubota RTV #32807
Truck, 2006 Chevy C4500 #2020	Equip, Kubota RTV #89150
Truck, 2006 Chevy C4500 #2022	Equip, Moffit
Truck, 2006 Chevy C4500 #2023	Equip, PSI 4GPM Pressure Washer
Truck, 2006 Chevy C4500 #2024	Equip, Small Equipment, 2 Cycle
Truck, 2007 Mack #2051	Equip, Small Equipment, 2 Cycle
Truck, 2007 Mack #2052	Equip, Small Equipment, 2 Cycle
Truck, 2011 Ford F150 #2025	Equip, Small Equipment, 2 Cycle
Truck, 2012 Ford F150 #2027	Equip, Small Equipment, 2 Cycle
Truck, 2013 Ford F150 #2026	Equip, Small Equipment, 2 Cycle
Truck, 2013 Isuzu Dump #2065	Equip, Small Equipment, 2 Cycle
Truck, 2014 Ford F150 #2032	Equip, Small Equipment, 2 Cycle
Truck, 2014 Ford F250 #2028	Equip, Small Equipment, 2 Cycle
Truck, 2014 Ford F550 #2030	Equip, Small Equipment, 2 Cycle
Truck, 2015 Ford F150 #2036	Equip, Small Equipment, 2 Cycle
Truck, 2015 Ford F250 #2029	Equip, Small Equipment, 2 Cycle
Truck, 2015 Ford F250 #2033	Equip, Small Equipment, 2 Cycle
Truck, 2015 Ford Transit #2035	Equip, Small Equipment, 2 Cycle
Truck, 2016 Ford F250 #2038	Equip, Small Equipment, 2 Cycle
Truck, 2016 Ford F250 #2054	Equip, Small Equipment, 2 Cycle

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Office: (386) 437-3122 | landscape@verdego.com

Truck, 2016 Isuzu NPR #2063	Equip, Small Equipment, 2 Cycle
Truck, 2016 Transit #2037	Equip, Trencher
Truck, 2016 Transit #2041	Equip, Wacker Neuson Plate Compactor
Truck, 2017 Ford F250 #2039	Equip, Wheel Blower
Truck, 2017 Ford F250 #2045	EZ Go Golf Cart
Truck, 2017 Ford F250 #2049	Mower, 2012 Toro GR1600 #00291
Truck, 2017 Ford Truck #2050	Mower, 2014 Toro RM3100 #00272
Truck, 2017 Isuzu NPR #2064	Mower, 2016 30" Kawasaki #52350
Truck, 2018 Ford F150 #2058	Mower, 2016 52" Vantage #54221
Truck, 2018 Ford F250 #2044	Mower, 2016 60" Lazer #44083
Truck, 2018 Ford F250 #2047	Mower, 2016 60" Lazer Cut #27202
Truck, 2018 Ford F250 #2048	Mower, 2016 72" Exmark Lazer #56166
Truck, 2018 Ford F250 #2056	Mower, 2017 30" Kawasaki #68746
Truck, 2018 Ford F250 #2061	Mower, 2017 36" Vantage #72898
Truck, 2018 Ford Transit #2053	Mower, 2017 52" Turf Tracer #19825
Truck, 2018 Ford Transit #2059	Mower, 2017 60" Lazer #21833
Truck, 2018 Isuzu NPR #2046	Mower, 2018 52" Turf Tracer #30268
Truck, 2018 Isuzu NPR HD #2042	Mower, 2018 60" Lazer #67841
Truck, 2019 Ford F150 #2070	Mower, 2018 Billy Goat 27" #17264
Truck, 2019 Ford F150 #2071	Mower, 2018 Jacobsen LF570 #101757
Truck, 2019 Ford F150 #2080	Mower, 36" Exmark Staris #54737
Truck, 2019 Ford F250 #2057	Mower, 36" Exmark Vantage
Truck, 2019 Ford F250 #2066	Mower, 48" Kawaski Ultra Cut #06988
Truck, 2019 Ford F250 #2068	Mower, 52" Grandstand
Truck, 2019 Ford F250 #2069	Mower, 52" Kawasaki Mower #46797
Truck, 2019 Ford Transit #2067	Mower, 52" Stand Up Kawaski
Truck, 2019 Isuzu Dump #2055	Mower, 52" Stand Up Kawaski
Truck, 2019 Isuzu Dump #2062	Mower, 52" Stand Up Kawaski
Truck, 2019 Isuzu NPR #2077	Mower, 52" Stand Up Kawaski
Truck, 2020 Ford F250 #2072	Mower, 52" Stand Up Kawaski
Truck, 2020 Ford F250 #2073	Mower, 52" Standup KOH
Truck, 2020 Ford F250 #2074	Mower, 52" Turf Tracer #12853
Truck, 2020 Ford F250 #2075	Mower, 52" Turf Tracer #30724
Truck, 2020 Ford F250 #2076	Mower, 52" Turf Tracer #30759
Truck, 2020 Ford Transit #2078	Mower, 52" Turf Tracer #81705
Truck, 2020 Ford Transit #2079	Mower, 52" Turf Tracer #91418
Truck, 2020 Isuzu #2081	Mower, 52" Turf Tracer #91498
Truck, 2020 Isuzu #2082	Mower, 52" Turf Tracer #91516

Mower, 52" Turf Tracer #99312
Mower, 60" Exmark 24724
Mower, 60" Grandstand
Mower, 60" Grandstand
Mower, 60" Kawaski #62891
Mower, 60" Lazer #03551
Mower, 60" Lazer #03552
Mower, 60" Lazer #07836
Mower, 60" Lazer #09717
Mower, 60" Lazer #21832
Mower, 60" Lazer #31131
Mower, 60" Lazer E #27347
Mower, 60" Lazer E #47139
Mower, 60" Lazer E #93797
Mower, 60" Lazer E Series 20741
Mower, 60" Trace Turf #18789
Mower, 60" Turf Tracer #94963
Mower, 60" Vantage #30867
Mower, 72" Exmark 32402
Mower, 72" Lazer #17257
Mower, 72" Lazer #74050
Mower, 72" Lazer #74051
Mower, 72" Lazer Z #21545
Mower, 72" Lazer Z #21548
Mower, 72" S. Series #69386
Mower, 96" Lazer Diesel #27608
Mower, Exmark Turf Tracer
Mower, Lazer E Series 60" #73010
Mower, Push Mower #76268
Mower, S Series
Mower, Turf Tracer #68801
slk09339 - Bobcat
Small Equipment, 2 Cycle
Small Equipment, 2 Cycle
Small Equipment, 2 Cycle
Small Equipment, 2 Cycle
Small Equipment, 2 Cycle
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Truck, 2006 Chevy C4500 #2022
Truck, 2006 Chevy C4500 #2023
Truck, 2006 Chevy C4500 #2024
Truck, 2007 Mack #2051
Truck, 2007 Mack #2052
Truck, 2011 Ford F150 #2025
Truck, 2012 Ford F150 #2027
Truck, 2013 Ford F150 #2026
Truck, 2013 Isuzu Dump #2065
Truck, 2014 Ford F150 #2032
Truck, 2014 Ford F250 #2028
Truck, 2014 Ford F550 #2030
Truck, 2015 Ford F150 #2036
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Truck, 2015 Ford F250 #2033
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Truck, 2016 Transit #2037
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Truck, 2017 Ford F250 #2039
Truck, 2017 Ford F250 #2045
Truck, 2017 Ford F250 #2049
Truck, 2017 Ford Truck #2050
Truck, 2017 Isuzu NPR #2064
Truck, 2018 Ford F150 #2058
Truck, 2018 Ford F250 #2044
Truck, 2018 Ford F250 #2047
Truck, 2018 Ford F250 #2048
Truck, 2018 Ford F250 #2056
Truck, 2018 Ford F250 #2061
Truck, 2018 Ford Transit #2053
Truck, 2018 Ford Transit #2059
Truck, 2018 Isuzu NPR #2046
Truck, 2018 Isuzu NPR HD #2042
Truck, 2019 Ford F150 #2070
Truck, 2019 Ford F150 #2071
Truck, 2019 Ford F150 #2080
Truck, 2019 Ford F250 #2057
Truck, 2019 Ford F250 #2066
Truck, 2019 Ford F250 #2068
Truck, 2019 Ford F250 #2069
Truck, 2019 Ford Transit #2067
Truck, 2019 Isuzu Dump #2055
Truck, 2019 Isuzu Dump #2062
Truck, 2019 Isuzu NPR #2077
Truck, 2020 Ford F250 #2072
Truck, 2020 Ford F250 #2073
Truck, 2020 Ford F250 #2074
Truck, 2020 Ford F250 #2075
Truck, 2020 Ford F250 #2076
Truck, 2020 Ford Transit #2078
Truck, 2020 Ford Transit #2079
Truck, 2020 Isuzu #2081
Truck, 2020 Isuzu #2082

Equip, Small Equipment, 2 Cycle
Equip, Trencher
Equip, Wacker Neuson Plate Compactor
Equip, Wheel Blower
EZ Go Golf Cart
Mower, 2012 Toro GR1600 #00291
Mower, 2014 Toro RM3100 #00272
Mower, 2016 30" Kawasaki #52350
Mower, 2016 52" Vantage #54221
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Mower, 2016 72" Exmark Lazer #56166
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Mower, 52" Grandstand
Mower, 52" Kawasaki Mower #46797
Mower, 52" Stand Up Kawaski
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Mower, 52" Stand Up Kawaski
Mower, 52" Stand Up Kawaski
Mower, 52" Stand Up Kawaski
Mower, 52" Standup KOH
Mower, 52" Turf Tracer #12853
Mower, 52" Turf Tracer #30724
Mower, 52" Turf Tracer #30759
Mower, 52" Turf Tracer #81705
Mower, 52" Turf Tracer #91418
Mower, 52" Turf Tracer #91498
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Mower, 60" Exmark 24724
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Mower, 72" Lazer Z #21545
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Mower, 72" S. Series #69386
Mower, 96" Lazer Diesel #27608
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Mower, Push Mower #76268
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slk09339 - Bobcat
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Small Equipment, 2 Cycle
Small Equipment, 2 Cycle



Maintenance Contracts

<\$100k

Aldi	Commercial
Browns Landing	HOA/Community
City of Holly Hill	Municipality
Cordoma Residence	Residential
Country Club Harbor HOA	HOA/Community
Dunkin Donuts - PC	Commercial
East Coast Sugery Center	Commercial
Ezell Residence	Residential
Father Lopez Catholic High School	Education/Campus
France Residence	Residential
Godfrey Residence	Residential
Guasta Residence	Residential
Intracoastal Bank	Commercial
Kennedy Residence	Residential
LaGrande Provence	Apartments/Condominiums
LPGA Headquarters	Commercial
Oceanside Condominiums	Apartments/Condominiums
Overbey Residence	Residential
Porto Mar	HOA/Community
Sabal Palms Assisted Living	Retirement/Assisted Living
Seventh Day Adventist Church	Commercial
Silver Creek Retirement Community	Retirement/Assisted Living
South Beach Condo COA	Apartments/Condominiums
Springwood Village	Apartments/Condominiums
Starcevich Residence	Residential
Tobin Residence	Residential
Tuscan Gardens	Retirement/Assisted Living
Ware Residence	Residential
Westlake Property Association Headquarters	Commercial

PROJECTS PROPOSER COMPLETED IN THE LAST TWO YEARS

Company Name N/A Typical for Construction Installation

Date _____

List all projects completed in the last two years for which the contract value individually exceeded 3% of the Proposer's annual total work completed for the year the project was started. Include in the list projects that were started earlier than two years but were completed within the last two years.

Project Name/Location	Final Contract Amount	Prime or Sub ¹	Classification of Work Performed	Year Started/Completed	Owner Name/Location ²	Name & Phone Number of Owner's Representative on this Project ³

¹ 'Prime or Sub' should indicate whether Proposer performed the work as a prime contractor or as a subcontractor.
² 'Owner Name/Location' should indicate the Owner of the project if the Proposer performed the work as a prime contractor or the general contractor if the Proposer performed the work as a subcontractor.
³ 'Name & Phone Number of Owner's Representative on this Project' should list a reference from the business entity listed in the previous column familiar with Proposer's contract performance.
 4881-7433-3076.1

AFFIDAVIT FOR INDIVIDUAL N/A

State of _____ ss:

County of _____

_____, being duly sworn, deposes and says that the statements and answers to the questions concerning experience contained herein are correct and true as of this date; and that he/she understands that intentional inclusion of false, deceptive or fraudulent statements on this statement constitutes fraud; and, that the District considers such action on the part of the Proposer to constitute good cause for rejecting Proposer's proposal.

(Proposer must also sign here)

Sworn to and subscribed before me this _____ day of _____, 2023, by _____

(Official Notary Signature & Seal)
Name: _____
Personally Known _____
OR Produced Identification _____
Type of Identification _____

AFFIDAVIT FOR PARTNERSHIP

N/A

State of _____

ss:

County of _____

_____, is a member of the firm of _____, being duly sworn, deposes and says that the statements and answers to the questions of the foregoing experience questionnaire are correct and true as of the date of this affidavit; and, that he/she understands that intentional inclusion of false, deceptive or fraudulent statements on this statement constitutes fraud; and, that the District considers such action on the part of the Proposer to constitute good cause for rejecting Proposer's proposal.

(Signature of a General Partner is Required)

Sworn to and subscribed before me this _____ day of _____, 2023, by _____.

(Official Notary Signature & Seal)

Name: _____

Personally Known _____

OR Produced Identification _____

Type of Identification _____

**AFFIDAVIT FOR CORPORATION
LLC**

State of Florida

ss: FEIN: 27-4398666

County of Bunnell

William Genovese
(title) Director of Business Development
of the VerdeGo Landscape


(a corporation described herein) being duly sworn, deposes and says that the statements and answers to the questions in the foregoing concerning experience are correct and true as of the date of this affidavit; and, that he/she understands that intentional inclusion of false, deceptive or fraudulent statements in this statement constitutes fraud; and, that the District considers such action on the part of the Proposer to constitute good cause for rejection of Proposer's proposal.

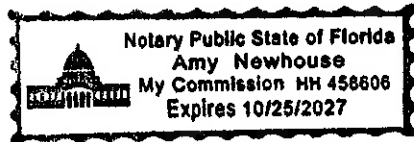


(Officer must also sign here)

CORPORATE SEAL

Sworn to and subscribed before me this 18th day of Jan., 2024, 2023, by _____
William Genovese VerdeGo Landscape

(Official Notary Signature & Seal)
Name: 
Personally Known
OR Produced Identification _____
Type of Identification _____



**SWORN STATEMENT PURSUANT TO CHAPTER 287, *FLORIDA STATUTES*, ON
INTEGRITY OF PUBLIC CONTRACTING AND PURCHASING**

**THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC
OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.**

1. This sworn statement is submitted to Bartram Springs Community Development District ("District")
(print name of the public entity)

by William Genovese / Director of Business Development
(print individual's name and title)

for [NAME OF PROPOSER] ("Proposer") VerdeGo LLC
(print name of entity submitting sworn statement)

whose business address is _____

3335 N. State Street, Bunnell, FL 32110

and (if applicable) its Federal Employer Identification Number (FEIN) is 27-4398666

(If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement)

2. I have read and am familiar with Chapter 287, *Florida Statutes*, and specifically including the following Sections ("Public Integrity Laws"):
- a. Section 287.133, *Florida Statutes*, titled *Public entity crime; denial or revocation of the right to transact business with public entities*;
 - b. Section 287.134, *Florida Statutes*, titled *Discrimination; denial or revocation of the right to transact business with public entities*;
 - c. Section 287.135, *Florida Statutes*, titled *Prohibition against contracting with scrutinized companies*;
 - d. Section 287.137, *Florida Statutes*, titled *Antitrust violations; denial or revocation of the right to transact business with public entities; denial of economic benefits*; and
 - e. Section 287.138, *Florida Statutes*, titled *Contracting with entities of foreign countries of concern prohibited*.
3. I understand that the Public Integrity Laws, with limited exceptions, prohibit entities that meet certain criteria from bidding on or entering into or renewing a contract with governmental entities, including with the District ("Prohibited Criteria").
4. I understand that the Public Integrity Laws apply to the bidding documents applicable to the District's Request for Proposals for Landscape and Irrigation Maintenance Services Project ("Project") and the contract to be executed in connection with the Project.
5. Based on information and belief, the statement which I have marked below is true in relation to the Proposer submitting this sworn statement. (Indicate which statement applies.)

Neither the entity submitting this sworn statement, nor any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity, meets any of the Prohibited Criteria. Thus, the entity is not prohibited from bidding on or entering into or renewing a contract with the District.

The entity submitting this sworn statement, one of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity, meets one or more of the Prohibited Criteria.

If this statement is marked, the Proposer may provide additional information regarding the same in the space provided directly below (or by attaching a separate sheet and indicating this method in the space provided directly below). Such additional information may be related to the Proposer's alleged basis for entitlement to an exception from the prohibition on bidding or contracting, to the extent one is permissible under Florida law.

6. If awarded the contract, the Proposer will immediately notify the District in writing if either the Proposer, any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or any affiliate of the entity, meets any of the Prohibited Criteria after award of the contract or during the term of the contract.

[Signature page follows]

IT SHALL BE THE RESPONSIBILITY OF THE PROPOSER EXECUTING THIS AFFIDAVIT TO VERIFY THAT NONE OF THE SUBCONTRACTORS/SUPPLIERS UTILIZED FOR THIS BID/QUOTE MEET ANY OF THE PROHIBITED CRITERIA. IN THE EVENT IT IS LATER DISCOVERED THAT A SUBCONTRACTOR/SUPPLIER MEETS ANY OF THE PROHIBITED CRITERIA, THE PROPOSER SHALL SUBSTITUTE THE SUBCONTRACTOR/ SUPPLIER WITH ANOTHER WHO DOES NOT MEET ANY OF THE PROHIBITED CRITERIA. ANY COST ASSOCIATED WITH THIS SUBSTITUTION SHALL BE THE SOLE RESPONSIBILITY OF THE PROPOSER.

The foregoing SWORN STATEMENT is dated this 18 day of Jan., 2023, 2024

(Corporate Seal, if applicable)

VerdeGo LLC
(Name of Proposer)

[Signature]

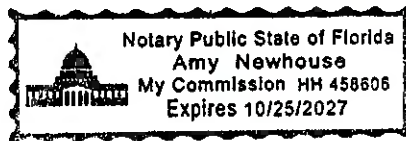
By: William Genovese

Title: Director of Business Development

STATE OF Florida
COUNTY OF Duval

The foregoing instrument was sworn and subscribed before me by means of physical presence or online notarization, this 18 day of Jan., 2023, by William Genovese of VerdeGo LLC, who is personally known to me or who has produced Himself as identification, and did [] or did not [] take the oath.

[Signature]
Notary Public, State of Florida
Print Name: Amy Newhouse
Commission No.: HH 459600
My Commission Expires: 10/25/27



Who We Are

Rooted in Relationships

For almost 20 years we've been rising before the sun, rolling up our sleeves, growing strong, healthy plants and creating beautiful environments. We understand that landscaping is a continuous process that requires diligence, responsibility, consistency, and that excellence lies in the details. We deliver exceptional results by going above and beyond, building relationships that blossom into long-term partnerships.

Our Mission

VerdeGo Landscape's promise goes beyond thriving landscapes. We take pride in our work and aim to act as trusted advisors to our clients with customized solutions and exceeded expectations. We are dedicated to delivering exceptional results.

Operational Approaches

Communication

Proactive and Continuous communication is a key factor to our success and sets us apart as a company.

Dedicated Staff

Results come when your team truly connects with the property, they are servicing.

Consistency

Retaining the same crew on a sited job allows them to take pride and ownership in their results.

Accountability

Being accountable means working with integrity. Monthly internal assessments are used to evaluate the property's status and our team's performance.

Our Team

VerdeGo is led by our President, TJ McNitt, who has over 24 years of industry experience and holds several certifications including a General Contractor’s license. An assigned Account Manager will be your day-to-day point of contact. The Account Manager will supervise all crew members as well as monitor the property to ensure the highest quality of performance is met. Full transparency is important to us and that is why we have included the contact information for all administrators related to your job. Please feel free to reach out any time you have questions or concerns.



TJ McNitt

24 yrs. Industry Experience

President

Bruno Perez

25 yrs. Industry Experience

Director of Operations

Paul Lukert

30 yrs. Industry Experience

Branch Manager

Bryan Wackes

13 yrs. Industry Experience

Account Manager

TJ McNitt

President

(386) 437-3122
tmcnitt@verdego.com

Bruno Perez

Director of Operation

(386) 237-2313
bperez@verdego.com

Paul Lukert

Branch Manager

(813) 416-9892
plukert@verdego.com

Bryan Wackes

Account Manager

(386) 268-4915
bwackes@verdego.com

Operational Approach—Bartram Springs

As the new Account Manager for Bartram Springs, I have worked along with my colleagues at VerdeGo to shift the operational approach for the community, yielding positive outcomes and the potential for continued growth. I was hired as a Horticulturist and Lawn & Ornamental Pest Control Operator to share my knowledge in these areas and take the lead on improving the quality of service for our valued partners.

Since August, we have implemented the following new procedures resulting from the characteristics and needs detected during my first property evaluation, tailored to Bartram Springs, as landscaping is not a “one size fits all” service. A few of the many adjustments we have made are as follows:



- **Property evaluation reports**
 - Monthly formal property evaluations discovering action items
 - Proactive approaches for future challenges
 - Beautification/enhancement recommendations
 - Inspection of turf and shrubs for overall health and appearance
- **Crew enhancements**
 - Replaced crew supervisor that is responsible for executing our maintenance services
 - Updated crew to a new four-person team with high focus on attention to detail and employees skilled in the specific areas of concern for the community
 - VerdeGo supports a multi-tier management model, consisting of a branch manager, account manager, and a production manager to work hands on with team members to execute the goals and visions for the community through our partnership.
- **Operational adjustments**
 - Monthly action items are detected and addressed through property evaluations
 - Members from the Bartram and Vesta team are invited and welcomed to join monthly evaluations to strengthen our partnership and address concerns and/or desires
 - Proactive meetings have been implemented to determine seasonal flower rotations and color selection to ensure timely ordering and availability

Looking into the future, we will continue using the methods above to build our partnership. I personally encourage communication and welcome any ideas the community or property manager may feel necessary to create the most aesthetically pleasing and healthy landscape environment. My goal is to continue to work ahead to ensure seasonal changes are smooth and consistent and stay ahead of any issues that could cause loss or stress on the environment as landscape is one of the most predominant features homeowners enjoy throughout their community.




Bartram Springs Community Development District

Mow & Detail Schedule

-  Day 1
-  Day 2



A photograph of a residential street with large trees and a blue sky with light clouds. The image is partially obscured by a dark, semi-transparent rectangular overlay.

Bartram Springs- December

Tuesday, December 12, 2023

32 Areas Identified



Area 1- Light Poles

Assigned To Property Note

(5) light poles were cleared of tree limbs to provide clearance. They were above 14' but we were able to safely remove them



Area 2 - Turf Treatment

Assigned To Property Note

On 12/5 turf was treated for insects, weeds and liquid fertilization applied



Area 3 - Annual Beds

Assigned To Property Note

Annual beds are blooming and doing well. Liquid fertilizer was applied to help promote continuous blooms.



Area 4 - Entrance

Assigned To Property Note

Entrance side of the community was trimmed last week



Area 5 - Entrance

Assigned To Property Note

Entrance side of the community was trimmed last week including the large Ligustrum trees



Area 6- Exit Side

Assigned To Maintenance Crew
Crew will trim the exit side of the community on their 12/14 visit



Area 7 - Entrance Side Fence

Assigned To Maintenance Crew
Now that herbicide has killed the vine, remove what you can from the fence



Area 8

Assigned To Property Note
Turf was treated on 12/5



Area 30 - Amenity Center
Assigned To Maintenance Crew
Lift trees off dumpster area



Area 31 - Amenity Center Rose Plants
Assigned To Proposal Work
I suggest replacing all rose plants with a
different plant material that is hardier for
this high visible area



Area 32 - Amenity Center
Assigned To Maintenance Crew
Clip dead branch out of Ligustrum tree

Bryan Wackes
VerdeGo Landscape

References

Property		Manager	Contact Info	Phone
Ocean Hammock POA	\$650K+	Amy Spradling	aspradling@mayresort.com	386-446-0085
Middle Village CDD	\$488K	Jay Soriano	jsoriano@gmsnf.com	904-562-0249
Double Branch CDD	\$422K	Jay Soriano	jsoriano@gmsnf.com	904-562-0249
Town Center at Palm Coast CDD	\$432K	Clint Smith	Clintsmith@aol.com	386-931-4496
The Riverfront Esplanade	\$397K	Joe Yarbrough	jwysdaytonafl@gmail.com	386-299-6373
World Golf Village	\$240K	Sarah McFee	smcfee@maymgt.com	855-629-9481 Ext 321



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

09/26/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Brown & Brown of Tennessee, Inc. 6 Cadillac Drive, Suite 200 Brentwood TN 37027		CONTACT NAME: Tasha Felts, TIA PHONE (A/C, No, Ext): (615) 385-2860 E-MAIL ADDRESS: Tasha.Felts@bbrown.com		FAX (A/C, No): (615) 385-8360	
INSURED Verdego, LLC 3335 N. State Street Bunnell FL 32110		INSURER(S) AFFORDING COVERAGE		NAIC #	
		INSURER A: Travelers Property Casualty Company of America		25674	
		INSURER B: The Travelers Indemnity Company of Connecticut		25682	
		INSURER C:			
		INSURER D:			
		INSURER E:			
		INSURER F:			

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


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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			TC2JGLSA-3P390744-TIL-23	10/01/2023	10/01/2024	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS ONLY			TC2JCAP-3P390756-TIL-23	10/01/2023	10/01/2024	COMBINED SINGLE LIMIT (Ea accident) \$ 5,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> EXCESS LIAB DED <input checked="" type="checkbox"/> RETENTION \$ 10,000			CUP-0W036142-23-NF	10/01/2023	10/01/2024	EACH OCCURRENCE \$ 10,000,000 AGGREGATE \$ 10,000,000
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		N/A	UB-4S050569-23-51-K	10/01/2023	10/01/2024	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
A	Inland Marine			QT-630- 4S014177-TIL-23	10/01/2023	10/01/2024	Leased/ Rented Equip \$200,000 Deductible \$1,000

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

SAMPLE CERTIFICATE

CERTIFICATE HOLDER**CANCELLATION**

VERDEGO LLC / VERDEGO LANDSCAPE LLC PO BOX 789 3335 N. STATE STREET BUNNELL FL 32110	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 
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Ron DeSantis, Governor

Melanie S. Griffin, Secretary



**STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION**

CONSTRUCTION INDUSTRY LICENSING BOARD

THE GENERAL CONTRACTOR HEREIN IS CERTIFIED UNDER THE
PROVISIONS OF CHAPTER 489, FLORIDA STATUTES

MCNITT, TERRY M JR

VERDEGO LLC

39 AUDUBON LANE

FLAGLER BEACH FL 32136

LICENSE NUMBER: CGC1506752

EXPIRATION DATE: AUGUST 31, 2024

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.

Certifications & Licenses



Select Certified
IRRIGATION ASSOCIATION
Experienced professionals. Efficient solutions.



Ryan Seifert
CIC, CLIA

Certification ID#: 75785

OSHA Occupational Safety and Health Administration **30-003981889**

This card acknowledges that the recipient has successfully completed a 10-hour Occupational Safety and Health Training Course in **Construction Safety and Health**

Ryan Seifert

HAROLD BROWN **2/24/2012**
(Trainer name – print or type) (Course end date)

OSHA Occupational Safety and Health Administration **30-003981889**

This card acknowledges that the recipient has successfully completed a 30-hour Occupational Safety and Health Training Course in **Construction Safety and Health**

RYAN SEIFERT

Marie Athey **8/18/2015**
(Trainer name – print or type) (Course end date)



ProFirstAid[®] Basic

a ProTrainings.com company

This card certifies that the individual has successfully completed the National Cognitive Evaluation in accordance with ProTrainings Curriculum and the American Heart Association[®] guidelines

RYAN SEIFERT

has completed CPR & First Aid (AED inclusive) Certification

Certifications & Licenses



HUNTER Technician



Ryan Seifert

has successfully completed the

Hunter Product Technician
ONLINE TRAINING PROGRAM

Phil Robison
PHIL ROBISON, CEO, CCM, CSM
Senior Vice President, Marketing
and Business Development

Todd Polsterman
TODD D. POLSTERMAN, CEO, CCM, CSM
Vice President, Marketing
and Business Development

Hunter

HUNTER Specialist



Ryan Seifert

has successfully completed the

Hunter Product Specialist
Hydrawise
ONLINE TRAINING PROGRAM

Phil Robison
PHIL ROBISON, CEO, CCM, CSM
Senior Vice President, Marketing
and Business Development

Todd Polsterman
TODD D. POLSTERMAN, CEO, CCM, CSM
Vice President, Marketing
and Business Development

Hunter

HUNTER Specialist



Ryan Seifert

has successfully completed the

Hunter Product Specialist
I-Core and Dual
ONLINE TRAINING PROGRAM

Phil Robison
PHIL ROBISON, CEO, CCM, CSM
Senior Vice President, Marketing
and Business Development

Todd Polsterman
TODD D. POLSTERMAN, CEO, CCM, CSM
Vice President, Marketing
and Business Development

Hunter

HUNTER Specialist



Ryan Seifert

has successfully completed the

Hunter Product Specialist
ACC and ACC-99D
ONLINE TRAINING PROGRAM

Phil Robison
PHIL ROBISON, CEO, CCM, CSM
Senior Vice President, Marketing
and Business Development

Todd Polsterman
TODD D. POLSTERMAN, CEO, CCM, CSM
Vice President, Marketing
and Business Development

Hunter

Certifications & Licenses



THE AMERICAN INSTITUTE OF ARCHITECTS

AIA Document A310 Bid Bond

KNOW ALL MEN BY THESE PRESENTS, THAT WE Yellowstone Landscape- Southeast
3525 North State Street, Bunnell, FL 32110

as Principal, hereinafter called the Principal, and United States Fire Insurance Company
305 Madison Avenue, Morristown, NJ 07960

a corporation duly organized under the laws of the State of DE

as Surety, hereinafter called the Surety, are held and firmly bound unto BARTRAM SPRINGS COMMUNITY
DEVELOPMENT DISTRICT 475 West Town Place, Suite 114, St. Augustine, FL 32092

as Obligee, hereinafter called the Obligee, in the sum of Twenty Five Thousand Dollars and 00/100

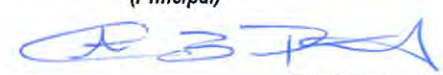
Dollars (\$ 25,000.00),
for the payment of which sum well and truly to be made, the said Principal and the said Surety, bind ourselves, our heirs,
executors, administrators, successors and assigns, jointly and severally, firmly by these presents.


WHEREAS, the Principal has submitted a bid for LANDSCAPE AND IRRIGATION MAINTENANCE SERVICES

NOW, THEREFORE, if the Obligee shall accept the bid of the Principal and the Principal shall enter into a Contract with the Obligee in accordance with the terms of such bid, and give such bond or bonds as may be specified in the bidding or Contract Documents with good and sufficient surety for the faithful performance of such Contract and for the prompt payment of labor and materials furnished in the prosecution thereof, or in the event of the failure of the Principal to enter such Contract and give such bond or bonds, if the Principal shall pay to the Obligee the difference not to exceed the penalty hereof between the amount specified in said bid and such larger amount for which the Obligee may in good faith contract with another party to perform the Work covered by said bid, then this obligation shall be null and void, otherwise to remain in full force and effect.

Signed and sealed this 16th day of January, 2024


Garrett Connady
(Witness)

Yellowstone Landscape- Southeast
(Principal) (Seal)
By:  Bus. Dev. Manger
(Title)


Ryan Norman
(Witness)

United States Fire Insurance Company
(Surety) (Seal)
By:  Attorney-in-Fact Bradley Mapes
(Title)



**POWER OF ATTORNEY
UNITED STATES FIRE INSURANCE COMPANY
PRINCIPAL OFFICE - MORRISTOWN, NEW JERSEY**

KNOW ALL MEN BY THESE PRESENTS: That United States Fire Insurance Company, a corporation duly organized and existing under the laws of the state of Delaware, has made, constituted and appointed, and does hereby make, constitute and appoint:

Stephen A. Vann; Sarah C. Belcastro; Oana Dimulescu; Jodi Jennings; Mario Medina; Bradley Mapes; Shana Kae Meyer

each, its true and lawful Attorney(s)-In-Fact, with full power and authority hereby conferred in its name, place and stead, to execute, acknowledge and deliver: Any and all bonds and undertakings of surety and other documents that the ordinary course of surety business may require, and to bind United States Fire Insurance Company thereby as fully and to the same extent as if such bonds or undertakings had been duly executed and acknowledged by the regularly elected officers of United States Fire Insurance Company at its principal office, in amounts or penalties: **One Hundred Twenty Five Million Eight Hundred Thousand Dollars (\$125,800,000)**

This Power of Attorney limits the act of those named therein to the bonds and undertakings specifically named therein, and they have no authority to bind United States Fire Insurance Company except in the manner and to the extent therein stated.

This Power of Attorney revokes all previous Powers of Attorney issued on behalf of the Attorneys-In-Fact named above.

This Power of Attorney is granted pursuant to Article IV of the By-Laws of United States Fire Insurance Company as now in full force and effect, and consistent with Article III thereof, which Articles provide, in pertinent part:

Article IV, Execution of Instruments - Except as the Board of Directors may authorize by resolution, the Chairman of the Board, President, any Vice-President, any Assistant Vice President, the Secretary, or any Assistant Secretary shall have power on behalf of the Corporation:

- (a) to execute, affix the corporate seal manually or by facsimile to, acknowledge, verify and deliver any contracts, obligations, instruments and documents whatsoever in connection with its business including, without limiting the foregoing, any bonds, guarantees, undertakings, recognizances, powers of attorney or revocations of any powers of attorney, stipulations, policies of insurance, deeds, leases, mortgages, releases, satisfactions and agency agreements;
- (b) to appoint, in writing, one or more persons for any or all of the purposes mentioned in the preceding paragraph (a), including affixing the seal of the Corporation.

Article III, Officers, Section 3.11, Facsimile Signatures. The signature of any officer authorized by the Corporation to sign any bonds, guarantees, undertakings, recognizances, stipulations, powers of attorney or revocations of any powers of attorney and policies of insurance issued by the Corporation may be printed, facsimile, lithographed or otherwise produced. In addition, if and as authorized by the Board of Directors, dividend warrants or checks, or other numerous instruments similar to one another in form, may be signed by the facsimile signature or signatures, lithographed or otherwise produced, of such officer or officers of the Corporation as from time to time may be authorized to sign such instruments on behalf of the Corporation. The Corporation may continue to use for the purposes herein stated the facsimile signature of any person or persons who shall have been such officer or officers of the Corporation, notwithstanding the fact that he may have ceased to be such at the time when such instruments shall be issued.

IN WITNESS WHEREOF, United States Fire Insurance Company has caused these presents to be signed and attested by its appropriate officer and its corporate seal hereunto affixed this 28th day of September, 2021.

UNITED STATES FIRE INSURANCE COMPANY



Matthew E. Lubin

Matthew E. Lubin, President

State of New Jersey }
County of Morris }

On this 28th day of September, 2021, before me, a Notary public of the State of New Jersey, came the above named officer of United States Fire Insurance Company, to me personally known to be the individual and officer described herein, and acknowledged that he executed the foregoing instrument and affixed the seal of United States Fire Insurance Company thereto by the authority of his office.



Melissa H. D'Alessio

Melissa H. D'Alessio (Notary Public)

I, the undersigned officer of United States Fire Insurance Company, a Delaware corporation, do hereby certify that the original Power of Attorney of which the foregoing is a full, true and correct copy is still in force and effect and has not been revoked.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed the corporate seal of United States Fire Insurance Company on the 16th day of January 20²⁴

UNITED STATES FIRE INSURANCE COMPANY



Michael C. Fay

Michael C. Fay, Senior Vice President

Landscape & Irrigation Maintenance Services Proposal

prepared for



January 2024



YELLOWSTONE
LANDSCAPE



YELLOWSTONE
LANDSCAPE

2663 Robert Street

Jacksonville, FL, 32207

www.yellowstonelandscape.com

January 17, 2024

Bartram Springs CDD
c/o Governmental Management Services
475 West Town Place, Suite 114
St. Augustine, FL 32092

Re: Capabilities, Understanding your Scope, and Approach to Landscape Maintenance Services for Bartram Springs CDD

Dear board members,

Thank you for considering a renewed partnership with **Yellowstone Landscape** as your landscape maintenance provider. This community is special to us with where it is located and the fact that we maintained it many years ago. I, myself, grew up in Julington Creek Plantation from 1992 – 2008 and have watched this area develop into what it is now. Coming back from Gainesville to visit my parents throughout the time I was in school and seeing the growth expand even more, in my eyes, says that there is something special about this area and why we all live/lived here. I remember when Bartram Springs was just getting started and visiting my friends that lived here. To see what it is today and how the community has turned out is pretty awesome.

Joining Yellowstone 6 years ago now, I joined a company with a goal of quality. Every landscape company says it, but I joined Yellowstone because the culture backed it. Your community is in need of some of the landscape basics to be done and to be done the right way, at the right time of year. A lot of your shrubs throughout the community have and are being improperly pruned. This is the reason for the 'leggy' appearance at the bottoms. Shrubs should not look like multiple mountain peaks and individualized plantings. They are better served level, rounded on the edges, and have the bottom be slightly wider than the top so that the sunlight can reach the bottom preventing the 'leggy' appearance. Palms should be pruned at the correct time of year to prevent the reproductive cycle from occurring (seed pods dropping, causing volunteer growth and a mess on pool decks, walkways, parking lots, etc.) and fronds cut at the correct length to ensure the trunk develops in a uniform width as it grows. Bermuda grass is a variety of turfgrass that likes to be kept low. Well below the height that yours has been and being kept at currently. These are only a few of the examples that we see happening right now and we would love to work with you on correcting them.

You have one of the most unique front entrances in Jacksonville with the waterfalls and ponds. This area has so much potential, and we would love to help unlock it here and everywhere else in your community. Our **On-Staff** designer has all of her certifications, but more importantly, worked at a nursery here in Jacksonville for multiple years before joining us. Because of this she knows exactly what works and where it will work. We would love to give you a vision of what it could look like and then provide a plan on how to get it done. This would encompass properly maintaining what is there as well as adding to it in areas of need.

I would invite you to please look at some of our properties such as **RiverTown** and **Beacon Lake** to see the differences these little practices can make overtime. We have had the pleasure to maintain Beacon Lake from the day it started, and these practices have been taking place from day 1. We will have these and several others on our reference pages for you to drive through and/or reach out to talk to our contacts that work with us.

Understanding Your Scope

To put it simply, keep the place looking great at all times. Your scope is very in depth. From the fertilization requirements for each type of turf to the heights of cut that differ on them as well. The scope calls for the ponds to be mowed at 3-3.5in which is what is needed to ensure there is minimal, if any, scalping that in turns causes erosion issues. Your scope calls for Bermuda to be kept below 2in which absolutely needs to be done. At the height it is now, it will have to be scalped prior to spring to get it there. Are there uneven areas in it, yes, but overtime with it being cut at the correct height it will adapt and the scalping will stop. Without doing this, the turf will continue to decline overtime. Sports fields need a different program of events (aeration, top dress, additional fertilization, etc.) to ensure they maintain their health due to the heavy traffic and use they endure. Some of these are outside of the scope but are absolutely needed. Our **In-House** Tree Care Division will ensure the trees and palms are maintained correctly and at the designated canopy heights of 12' and 14.5' for the canopy trees as well as help with the dead wood removal. They are led by on staff certified Arborists and with them being Yellowstone employees, we don't have to rely on an outside vendor for quality, timing, scheduling, etc. The scope also calls for the shrubs to not be improperly pruned into balls or unnatural shapes. Currently, they are being pruned this way in many areas. It also calls for flowering shrubs to be pruned after blooming which is essential to give the landscape the look that was intended by design personnel. The turf treatment scope calls for treatments of pests after identifying them. We like to take a proactive approach to a couple in particular. On top of the requirements for the turf, we use a product called Top Choice to prevent mole crickets in the Bermuda turf. We also use a product called Arena for chinch bugs in the St. Augustine turf. We do not charge additional for them. We have learned over the years that it is better for these to be prevented rather than identified and treated after the fact. They are both very prevalent and fast acting so we like to mitigate them as much as possible. Our chemical and fertilization applications are also done **In-House** so we can control exactly what is put down and when. Some other contractors rely on sub-contractors for their applications and a lot of them don't have Top Choice or Arena in their programs. They are pricy but worth it. Tree and Shrubs fertilization happens 3x per year but if things pop up in between these applications, they need to be treated and treated fast to ensure infestations don't occur. Knowing and understanding the scope is essential for the property to look the way it is intended to and for the district not to be charged for items they are already paying for. We pride ourselves on trying to see a problem before it occurs and proactively addressing it. Each person sees a landscape differently though, so anything brought to our attention, we address with a quick response time and in the proper way. We also use programs and technology to help us fully understand your community and everything involved with maintaining it according to the scope. Mapping technologies we use help us know what your measurements are down to the square foot and where we can find efficiencies to better service your property. We believe all of this is essential in being able to take care of the place you call **HOME**.

Yellowstone Landscape believes that we are the perfect fit for Bartram Springs CDD, and we feel we are equipped with the right personnel to build a long and meaningful partnership. We are beyond thankful for having this opportunity to provide GMS with this proposal. We look forward to hearing your feedback. Thank you!

Brad Poor
Business Development Manager
bpoor@yellowstonelandscape.com
904-760-7860

30/60/90 Day Plan



This checklist is provided as an outline of the initial tasks that our Landscape Maintenance teams will perform as we begin serving your property. We've divided the tasks over the first 30, 60, and 90 days of service in order to provide you with a tool to monitor and measure our team's performance as we begin our partnership as your landscape maintenance service partner.

30 Day Plan:

- ✓ Meet with Board Representative/property manager to review 30 – 60 – 90 Day Plan
- ✓ Discuss with Board our "Approach to Services" and scope of work
- ✓ Conduct arbor assessment with report identifying the locations throughout RiverTown
- ✓ Propose soil amendment to all seasonal flower beds prior to rotation at RiverTown
- ✓ Complete an irrigation audit of the entire system
- ✓ Present irrigation deficiencies with plan for corrections
- ✓ Begin maintenance – mowing, blowing, edging and leaf clean-up
- ✓ Hand pull and spray weeds in mulch beds
- ✓ Spot treat weeds in turf areas
- ✓ Continue weed control in planting beds
- ✓ Apply fertilizer to struggling shrubs throughout the property
- ✓ Begin insect and disease program on all plant material
- ✓ Discuss options for turf enhancements
- ✓ Prepare proposals for replacing missing and dead shrub material throughout property
- ✓ Perform first turf fertilizer application
- ✓ Walk Property with Board Representative/property manager to identify other areas of concern

30/60/90 Day Plan



60 Day Plan:

- ✓ Walk property with Board Representative to evaluate improvements
- ✓ Evaluate our “Approach to Services” and make any necessary adjustments
- ✓ Continue irrigation maintenance and inspections
- ✓ Provide arbor assessment proposal
- ✓ Continue routine maintenance – mowing, blowing, edging and leaf clean-up
- ✓ Retreat turf weeds
- ✓ Continue hand pulling and weed applications throughout property
- ✓ Monitor and treat insect and disease problems in plant material throughout property
- ✓ Discuss options to improve “curb appeal” in high profile areas

90 Day Plan:

- ✓ Walk property with Board Representative to evaluate improvements
- ✓ Assess results from actions taken in 30 day and 60 day plans.
- ✓ Continue irrigation maintenance/inspections
- ✓ Continue turf weed applications as needed
- ✓ Continue RoundUp applications in mulch beds
- ✓ Monitor and treat insect and disease problems in plant material throughout property
- ✓ Continue routine maintenance – mowing, blowing, edging and leaf clean-up



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Summary of Observations



SUMMARY OF OBSERVATIONS

This section includes photos taken during our initial observations of your property's landscape. They represent some of the areas and issues that would be an immediate focus for our service teams as a part of our Startup Plan.



IMAGE 1

The Elaeagnus shrubs throughout the community are being maintained too high. The shrubs were recently pruned, and the debris were left on top of the shrubs.



IMAGE 2

Palms throughout the community are in need of pruning. The current scope to does not reflect the proper trimming cycles.



IMAGE 3

Shrubs are not uniformed, and growing over the curb line. This was noted throughout the property.



IMAGE 4

Significant Bermuda sod growing inside the Jasmine bed. Recommend removal and, planting of Bermuda.



IMAGE 5

Significant weeds along the berm. Noted overgrown grasses throughout.



IMAGE 6

The Bermuda throughout the property is being cut too high. The picture indicates voids in the canopy due to the turf laying down because of the mow height.



IMAGE 7

Overgrown, and dead shrubs noted along the berms throughout. Recommend removal, and cutting back.



IMAGE 8

Weeds, and debris noted in tree ring. Also, lack of frequent edging. Recommend edging, removal of debris, and selective weeds spraying.



IMAGE 9

Bermuda height is too high. Noted throughout the property. Recommend cutting to 2" height.



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About Yellowstone



About Yellowstone Landscape



Yellowstone Landscape began in 2008 with the unification of established, independently successful local and regional landscape companies.

For more than a decade, we've been linked by a common goal to better serve our clients, sharing decades of experience in landscape maintenance, landscape design and installation, landscape enhancements, and tree care services.

Yellowstone Landscape has become one of the industry's fastest growing and most trusted commercial landscaping companies, proudly serving **more than 3000 clients** from local branch operations facilities across the South and Southwest. We offer a uniquely comprehensive selection of services, allowing us to serve a project through the years - from planning and design, to a mature and thriving landscape in the ground.

Yellowstone Landscape is dedicated to **creating and maintaining green spaces that enhance the quality of life where you live, work, and play**. We provide professional landscaping services to some of the most outstanding homeowner associations, local governments, master planned developments, resorts, corporate campuses, commercial office parks, schools, hospitals, apartment communities and retail centers across the South and Southwest.

Quick Facts About Yellowstone Landscape:

- Commercial Services Offered Include: Landscape Maintenance, Landscape Design & Installation, Landscape Enhancements, Irrigation System Maintenance, and Tree Care
- Over 2500 Full-Time Employees & 800 Seasonal and Part-Time Associates
- Established Executive Leadership and Operations Management Teams comprised of some of our industry's most respected men and women
- Safety Program Recognized as Among the Most Proactive in the Landscape Industry
- More than 1000 Vehicles in Our Service Fleet
- Local Operating Branches Across the South and Southwestern United States
- 93% Client Satisfaction Rating in our most recent annual client survey
- 29 National Landscape Awards of Excellence received since 2008
- More than 1,000,000 trees planted along public roadways in the last decade across the South and Southwest

Irrigation Installation & Management



There is **nothing more essential to the success of your landscape** than regular access to the right amount of water.

Commercial irrigation systems are sophisticated technology that require **special certification** to install and operate.

Our Irrigation Installation and Management Professionals are **experts in all major commercial irrigation systems**. From older systems in need of frequent repairs and updates, to the most modern and innovative water-wise systems available, **our Irrigation Teams are dedicated to protecting your valuable water resources**. Once installed, we always adhere

to local ordinances governing water use and have implemented the principles of the leading industry groups. These **guidelines govern how we design, install, and maintain your irrigation system**.

Professional irrigation management is an essential service to eliminate waste in your water consumption and reduce your water usage.

Yellowstone Landscape provides you with the most experienced team of Irrigation Professionals in the industry.

Hurricane Preparedness



RiverTown

Our priority at Yellowstone Landscape, should a hurricane or tropical storm be in the area, is for you to have a stress and worry free experience when dealing with landscape clean up after the storm.

As soon as conditions are safe, Yellowstone Landscape's landscape management crews are out cleaning up downed trees, tree limbs, and any other debris created by a hurricane or tropical depression to restore the property's landscape to it's original condition. Both local resources and statewide resources are readily available to assist with the storm clean up.

Local Resources

Each region is built with a solid team and resources, including an ample fleet of heavy machinery.

Additional Available Resources throughout the Southeast

Yellowstone Landscape has offices throughout the South. When a hurricane or other natural occurrence happens, resources are available from these districts.

Total Team Members	2000
Total CAT Equipment	50+
Trucks in Total Fleet	500+



Case Study

With the consecutive hurricanes that hit the Treasure Coast in 2004, the area was in need of an extensive landscape clean up, and our local office was in need of more resources. Ten employees along with multiple equipment from our Palm Coast office travelled to Treasure Coast, arriving at 6 a.m. the day after the storm, to help with roadway and entrance clean up, tree removal, etc. The crew stayed a few weeks to ensure each of the landscapes of the properties we maintain were back in pristine condition.

FROM THE CLIENT'S PERSPECTIVE

"Here is great news! A resident called this a.m. and gave kudos to me about your team's dedication during last week's trials and tribulations with [Tropical Storm] Fay. She could not say enough about organizing, planning and getting down and working hard."

**Property Manager
Port St. Lucie Property**

Arbor Care Division



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Your trees add beauty and value to your property. In the case of mature trees, they are an **absolutely irreplaceable asset**. Keep them healthy and protect your property with regular evaluations and treatments.

Yellowstone Landscape is a full service tree care company, specializing in Plant Health Care and Pruning in accordance with the highest industry standards. Our Tree Care teams are led by **certified Arborists**, educated and trained in all aspects of Arboriculture.

We're dedicated to improving and protecting your trees and shrubs, utilizing the latest innovations in tree care science.

Our Tree Care services include:

- Pruning
- Cabling & Bracing
- Lightning Protection
- Fertilization
- Disease & Pest Management
- Certified Arborist Consulting
- Storm Cleanup/Relief
- Tree Removal
- Arbor Jet
- Stump Grinding
- Root Management

Landscape Design



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You need your landscape to look its best, but you're not quite sure where to get started.

Whether you need a landscape design plan for a new development or just want to enhance a few feature areas in your existing landscape, our Landscape Designers are ready to help you see your landscape's full potential.

Our Designers are specially trained, creative professionals. They're knowledgeable about all the latest concepts in landscape design and they're also familiar with your area's local plant materials. This ensures that what they select to plant will thrive once it's in the ground.

The last thing you want is to invest in a landscape installation project, only to see the plants fail within the first year.

Working with a Landscape Designer starts with a meeting to find out what your goals are for your project. They'll create **photo renderings** so you can actually see what your new landscape will look like, before it's planted. You'll be a part of the process from beginning to end.

And best of all, we offer Landscape Design as a **complimentary service to current Landscape Maintenance clients** when we install your landscape enhancement.



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Certifications/Insurance





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State of



Florida

Department of Agriculture and Consumer Services
Bureau of Licensing and Enforcement

CERTIFIED PEST CONTROL OPERATOR

Number: JF279914

KYLE JORDAN STOUDENMIRE

This is to Certify that the individual named above is a Certified Pest Control Operator and is privileged to practice

Lawn and Ornamental

in conformity with an Act of the Legislature of the State of Florida regulating the practice of Pest Control and imposing penalties for violations.



In Testimony Whereof, Witness this signature at Tallahassee, Florida on December 18, 2018

Sarah R. Oglesby
Chief, Bureau of Licensing and Enforcement

Adam H. Putnam

Adam H. Putnam
Commissioner of Agriculture

FDACS 13618.06/01



The Florida Nursery, Growers & Landscape Association
Confers on

Bradley Poor

H9357303

The Title of
FNGLA Certified Horticulture Professional (FCHP)

Expiration Date: 03/31/2026
Certified Since: 1/25/2023

Eric Smith

Eric Smith, FNGLA President

Merry Mott

Merry Mott, FNGLA Certification Director



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INTERNATIONAL SOCIETY OF ARBORICULTURE
CERTIFIED ARBORIST™

Kyle Jordan Stoudenmire

Having successfully completed the requirements set by the International Society of Arboriculture, the above named is hereby recognized as an ISA Certified Arborist®



Kevin Mariage
Kevin Mariage
Director of Credentialing
International Society of Arboriculture

Caitlyn Polihan
Caitlyn Polihan
Executive Director
International Society of Arboriculture

FL-9365A
Certification Number

5 May 2018
Certified Since

30 Jun 2021
Expiration Date



#0847
ISO/IEC 17024
Personnel Certification Program
ISA Certified Arborist®



Ron DeSantis, Governor

Julie I. Brown, Secretary



STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

CONSTRUCTION INDUSTRY LICENSING BOARD

THE IRRIGATION SPECIALTY CONTRACTOR HEREIN IS CERTIFIED UNDER THE PROVISIONS OF CHAPTER 489, FLORIDA STATUTES



STOUDENMIRE, KYLE

YELLOWSTONE LANDSCAPE
3235 NORTH STATE STREET
BUNNELL FL 32110

LICENSE NUMBER: SCC131152501

EXPIRATION DATE: AUGUST 31, 2022

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.





CERTIFICATE OF LIABILITY INSURANCE

4/1/2023

DATE (MM/DD/YYYY)

7/5/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Lockton Companies 3280 Peachtree Road NE, Suite #250 Atlanta GA 30305 (404) 460-3600	CONTACT NAME: PHONE (A/C, No, Ext):	FAX (A/C, No):	
	E-MAIL ADDRESS:		
INSURER(S) AFFORDING COVERAGE		NAIC #	
INSURED 1472881 Yellowstone Landscape, Inc. and all Subsidiaries See Attached List 3235 N State Street P.O. Box 849 Bunnell FL 32110	INSURER A : Safety National Casualty Corporation		15105
	INSURER B : ACE Property & Casualty Insurance Co		20699
	INSURER C :		
	INSURER D :		
	INSURER E :		

COVERAGES Main NI COI's **CERTIFICATE NUMBER:** 18692274 **REVISION NUMBER:** XXXXXXXX


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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> Pesticide&Herbicide <input checked="" type="checkbox"/> SIR: \$250,000 GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJECT <input checked="" type="checkbox"/> LOC OTHER:	N	N	GL6676218	4/1/2022	4/1/2023	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COMP/CP AGG \$ 4,000,000 \$
A	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY	N	N	CA6676217	4/1/2022	4/1/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 2,000,000 BODILY INJURY (Per person) \$ XXXXXXXX BODILY INJURY (Per accident) \$ XXXXXXXX PROPERTY DAMAGE (Per accident) \$ XXXXXXXX \$ XXXXXXXX
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS MADE DED RETENTION \$	N	N	XOOG72569647	4/1/2022	4/1/2023	EACH OCCURRENCE \$ 10,000,000 AGGREGATE \$ 10,000,000 \$ XXXXXXXX
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	LDS4066360	4/1/2022	4/1/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
 REF: Yellowstone Landscape, Inc

CERTIFICATE HOLDER

CANCELLATION See Attachments

18692274 Evidence of Coverage	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE 

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BARTRAM SPRINGS COMMUNITY DEVELOPMENT DISTRICT

**ACKNOWLEDGMENT OF RECEIPT OF DOCUMENTS
AND PROPOSAL SIGNATURE FORM**

This Proposal for landscape and irrigation maintenance services has been submitted on this 18th day of January, 2023 by Yellowstone Landscape [company] whose business address is 2663 Robert Street, Jacksonville FL 32207, telephone number is 904-268-2626, fax number is 904-683-7327, and electronic mail address is bdougherty@yellowstonelandscape.com

The undersigned acknowledges, by the below execution of this proposal, that all information provided herein has been provided in full and that such information is truthful and accurate. Proposer agrees through submission of this Proposal to honor all pricing information ninety (90) days from the date of the Proposal opening, and if awarded the contract on the basis of this Proposal, to enter into and execute the services contract in substantially the form included in the proposal documents.

Proposer understands that inclusion of false, deceptive or fraudulent statements on this proposal constitutes fraud; and, that Bartram Springs Community Development District (the "District") considers such action on the part of the Proposer to constitute good cause for denial, suspension or revocation of a proposal for work for the District.

Furthermore, the undersigned acknowledges receipt of the following addenda, the provisions of which have been included in this Request for Proposal.

Addendum No. 1 dated 12/29/23

Addendum No. 2 dated 1/9/24

Addendum No. 3 dated 1/12/24

Addendum No. _____ dated _____

Addendum No. _____ dated _____

The undersigned hereby authorize(s) and request(s) any person, firm or corporation to furnish any pertinent information requested by the District, or their authorized agents, deemed necessary to verify the statements made in this proposal or attachments hereto, or regarding the ability, standing and general reputation of the Proposer.

Yellowstone Landscape
Name of Organization

By: *Clyde Bell*

This 17th day of January, 2023

By: *Cheyne Salesbee - Branch Manager*
Name and Title of Person Signing

(Apply Corporate Seal if filing as a Corporation)

State of Incorporation: _____

State of Florida

County of Duval

The foregoing instrument was acknowledged before me this 17th day of January, 2023, by _____, of the _____, who is personally known to me or who has produced _____ as identification and who did (did not) take an oath.

Melissa Lizette Cabanillas

Signature of Notary taking acknowledgment



PROPOSAL FORM
FOR
LANDSCAPE AND IRRIGATION MAINTENANCE OPERATIONS
FOR
BARTRAM SPRINGS
COMMUNITY DEVELOPMENT DISTRICT

TO BE SUBMITTED TO:

BARTRAM SPRINGS
COMMUNITY DEVELOPMENT DISTRICT
c/o Governmental Management Services, LLC
475 West Town Place, Suite 114
St. Augustine, Florida 32092

on or before 10:00 a.m. EST, January 4, 2023

TO: Bartram Springs Community Development District

FROM: Yellowstone Landscape

(Contractor)

In accordance with the Request for Proposals for Landscape and Irrigation Maintenance for Bartram Springs Community Development District, the undersigned proposes to conduct all Work necessary to provide complete Maintenance Operations as described in the Detailed Specifications and Maintenance Map.

All Proposals shall be in accordance with the project manual.

To: Bartram Springs Community Development District

Ladies and Gentlemen:

The undersigned, as Proposer, hereby declares (1) that the only person or persons interested in the Proposal, as principal or principals is or are names herein and that no other person than herein mentioned has any interest in the Proposal of the Contract to which the Work pertains, (2) that this Proposal is made without connection or arrangement with any other person, company, or parties making a Proposal and (3) that the Proposal is in all respects fair and made in good faith without collusion or fraud.

The Proposer further declares that he has examined the site of the Work; that he has made sufficient investigations to fully satisfy himself that such site is a correct and suitable one for this Work; and he assumes full responsibility therefore; that he has examined the Specifications for the Work and from his own experience or from professional advice that the Specifications are sufficient for the Work to be done and he has examined the other Contract Documents relating thereto, including the Notice to Contractors, Instructions to Proposer, Proposal, Agreement, General Conditions, Detailed Specifications and Maintenance Map and he has read all addenda prior to the opening of Proposals, and that he has satisfied himself fully, relative to all matters and conditions with respect to the Work to which this Proposal pertains.

The Proposer proposes and agrees, if this Proposal is accepted, to contract with the Owner in the form of contract specified, to furnish all necessary materials, all equipment, all necessary machinery, tools, apparatus, means of transportation, and labor necessary to complete the Work specified in the Proposal and the Agreement, and called for by the Detailed Specifications and Maintenance Map and in the manner specified.

Note: The proposal summary contained herein is merely illustrative of the minimum amount/quantity of Work to be performed under the Contract, in the case of any conflict between this schedule of Proposal items and the Contract Specifications, the Contract Specifications will prevail.

PER CONTRACT DOCUMENTS:

1. Certificate of insurance is enclosed with Proposal.
2. Proposal is for a one year term, with the option for four annual renewals thereafter.
3. Proposer certifies he has made a complete inspection of the site of the proposed work and fully understands and complies with the Instructions to Proposer.
4. The District reserves the right to add and delete individual items from the final Contract award and during the Contract term.
5. This Proposal covers all maintenance Work detailed in the general conditions, detailed specifications and Maintenance Map.



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Your Investment



6. Proposal amount is \$ 209,880.00 for year one.
 Written amount: Two Hundred and Nine Thousand, Eight Hundred and Eighty Dollars
- Renewal price is \$ 216,176.00 for year two.
 Written amount: Two Hundred and Sixteen Thousand, One Hundred and Seventy-Six Dollars
- Renewal price is \$ 222,661.00 for year three.
 Written amount: Two Hundred and Twenty-Two Thousand, Six Hundred and Sixty-One Dollars
- Renewal price is \$ 229,341.00 for year four.
 Written amount: Two Hundred and Twenty-Nine Thousand, Three Hundred and Forty-One Dollars
- Renewal price is \$ 236,221.00 for year five.
 Written amount: Two Hundred and Thirty-Six Thousand, Two Hundred and Twenty-One Dollars

Proposer: Yellowstone Landscape

SIGNATURE: Cheyne Solesbee

SIGNATURE: _____

TITLE: Branch Manager

TITLE: _____

ADDRESS: 2663 Robert St.

ADDRESS: _____

Jacksonville, FL 32207

SIGNATURE: _____

TITLE: _____

ADDRESS: _____

This form must be submitted with written proposal

**BARTRAM SPRINGS COMMUNITY DEVELOPMENT DISTRICT
LANDSCAPE AND IRRIGATION MAINTENANCE SERVICES**

UNIT PRICES

Please provide the following unit prices for the following items. Each unit price shall include all costs for complete, installed work including materials, labor, overhead and profit. All materials shall be Florida No. 1 or better.

SOD/SEED/MULCH:

Sodded Bermuda 419 Lawn, SF	\$ <u>1.77 per SF</u>
Sodded St. Augustine 'Floritam'	\$ <u>1.44 per SF</u>
Sodded Bahia Lawn, SF	\$ <u>1.11 per SF</u>
3" Deep Pine straw, SF	\$ <u>8.00 Per Bale</u>
3" Deep Shredded Hardwood Mulch, SF	\$ <u>58.00 Per YD</u>

***Recommend going direct through mulch supplier/installer. Yellowstone will assist overseeing at no charge. Estimate between 600-800 Cubic Yards depending on depth.

SHRUBS:

Daylily- 1 gal.	\$ <u>6.50</u>
Lantana – 1 gal.	\$ <u>6.50</u>
Parsons Juniper – 3 gal.	\$ <u>15.50</u>
Agapanthus – 3 gal.	\$ <u>16.50</u>
Loropetalum – 3 gal.	\$ <u>16.50</u>
Walters Viburnum – 3 gal.	\$ <u>17.00</u>
Muhly Grass – 3 gal.	\$ <u>14.00</u>

***Itemized pricing is subject to change. pricing is based off market value.

ANNUALS:

Annuals in 4" pots each	\$ <u>1.85</u>
-------------------------	----------------

TREES (CONTAINER):

Crape Myrtle – 30 gal.	\$ <u>250.00</u>
Live Oak – 45 gal.	\$ <u>650.00</u>
Live Oak – 100 gal.	\$ <u>1,000.00</u>
Southern Magnolia – 30 gal.	\$ <u>350.00</u>
Red Cedar- 30 gal.	\$ <u>300.00</u>

**BARTRAM SPRINGS COMMUNITY DEVELOPMENT DISTRICT
LANDSCAPE AND IRRIGATION MAINTENANCE SERVICES/UNIT PRICES
(PLEASE PROVIDE ACCURATE PRICING)**

COST FOR ADDITIONAL MOWING

Lump Sum, Area #1	\$ <u>1,350.00</u>
Lump Sum Bahia, Area #2	\$ <u>675.00</u>
Lump Sum Bahia, Area #3	\$ <u>648.00</u>

COST FOR ONE TIME ADDITIONAL POND MOWING

Lump Sum Bahia on Pond # 2	\$ <u>48.00</u>
Lump Sum Bahia on Pond # 4	\$ <u>52.00</u>
Lump Sum Bahia on Pond # 5	\$ <u>52.00</u>
Lump Sum Bahia on Pond # 6	\$ <u>52.00</u>
Lump Sum Bahia on Pond # 7	\$ <u>52.00</u>
Lump Sum Bahia on Pond # 10	\$ <u>15.00</u>
Lump Sum Bahia on Pond # 14	\$ <u>22.00</u>
Lump Sum Bahia on Pond # 16	\$ <u>55.00</u>
Lump Sum Bahia on Pond # 17	\$ <u>18.00</u>
Lump Sum Bahia on Pond # 20	\$ <u>48.00</u>
Lump Sum Bahia on Pond # 21	\$ <u>82.00</u>
Lump Sum Bahia on Pond # 22	\$ <u>48.00</u>
Lump Sum Bahia on Pond # 25	\$ <u>48.00</u>
Lump Sum Bahia on Pond #26	\$ <u>75.00</u>

COST FOR ONE TIME DRAINAGE EASEMENT ROUGH MOWING (RED AREAS ON MAP)

Lump Sum Drainage Easement # D 1	\$ <u>430.00</u>
Lump Sum Drainage Easement # D 2	\$ <u>620.00</u>
Lump Sum Drainage Easement # D 3	\$ <u>380.00</u>
Lump Sum Drainage Easement # D 4	\$ <u>280.00</u>

COST FOR BERMUDA TURF AERIFICATION

Aerification for both Bermuda Sports Fields	\$ <u>800.00</u>
---	------------------

COST TO OVERSEED BERMUDA SPORTS FIELDS

Overseeding for both Bermuda Sports Fields at a rate of 8 pounds of Rye Seed per 1000sqft \$ 3,600.00 Per Application

Refer to Detailed Specifications on Mulch removal.

MULCH REMOVAL Cost

Amenity Facility
Pool area and building \$ 3,800.00
Parking lot \$ 1,900.00

Entry
Entry thru Everest curb cut including median \$ 8,000.00

Center Medians
Everest to School Curb Cut \$ 4,100.00
School to Ginnie Springs Rd. \$ 3,980.00
Ginnie Springs Rd. to Charry Lake Dr. \$ 3,200.00

PALM SERVICES (PER LANDSCAPE SPECS)

Lump Sum Prune (Total Palms) \$ 7,524.00

Lump Sum Fungicide/Insecticide/Fertilize (Total Palms) \$ 980.00

Please provide unit prices for routine maintenance repair and replacement of the following items. Each unit price shall include costs for complete, installed work including materials, labor, overhead and profit.

CONTROLLER:

Rain Bird ESTP-32MC \$ Controller is no longer in production
Rain Bird ESP-24 \$ Controller is no longer in production

VALVE:

Rain Bird PGA/50 \$ 178.99

Heads: Rainbird or Hunter

Rotor \$ 25.00
Pop up 6" \$ 16.00
Pop up 12" \$ 22.00

WIRE:

14-1 Red Ft. \$.40
14-1 White Ft. \$.40
Wire Splice 3MDBR EA \$ 5.00

PIPE:

3" PR – 160, LF \$ 5.13 ***3" CL 200, LF-Thicker Pipe/better quality"
2-1/2" PR – 160, LF \$ 3.55 "
2" PR – 160, LF \$ 2.43 "

1-1/2" PR – 160, LF	\$ 1.58
1-1/4" PR – 160, LF	\$ 1.24
1" CL – 200, LF	\$.76
3/4" CL – 200, LF	\$.59
1/2" PR – 315, LF	\$.48

MISCELLANEOUS:

1/2" Flex PVC	\$ 1.44
3/4" Flex PVC	\$ 2.53

SLIP-FIX REPAIR COUPLING:

3", EA	\$ 77.00
2-1/2", EA	\$ 61.58
2", EA	\$ 39.68
1-1/2", EA	\$ 25.95
1-1/4", EA	\$ 23.65
1", EA	\$ 12.56
3/4", EA	\$ 10.87
1/2", EA	\$ 9.80

PLEASE PROVIDE HOURLY RATES FOR THE FOLLOWING ITEMS:

A. Mowers	\$ 43.00	Acre
B. Bush-Hog	\$ 85.00	Hour
C. Tractor	\$ 85.00	Hour
D. Supervisor with Transportation	\$ No Charge	Hour
E. Laborer with hand equipment	\$ 48.00	Hour
F. Truck	\$ 48.00	Hour
G. Irrigation Tech labor rate	\$ 93.00	Hour

**BARTRAM SPRINGS
COMMUNITY DEVELOPMENT DISTRICT**

**CONTRACTOR'S QUALIFICATION STATEMENT
Landscape and Irrigation Maintenance Services**

Yellowstone Landscape

Contractor

6. Is the Proposer incorporated in the State of Florida? yes (X) no ()

6.1 If yes, provide the following:

o Is the Company in good standing with the Florida Department of State, Division of Corporations? yes (X) no ()

If no, please explain _____

o Date incorporated 2007 Charter No. L05000035212

6.2 If no, provide the following:

o The State with whom the Proposer company is incorporated? _____

o Is the company in good standing with the State? yes () no ()

In no, please explain _____

o Date incorporated _____ Charter No. _____

o Is the Proposer company authorized to do business in the State of Florida? yes () no ()

7. Is the Proposer company a registered or licensed contractor with the State of Florida? yes () no ()

7.1 If yes, provide the following:

o Type of registration (i.e. certified general contractor, certified electrical contractor, etc.) Arborist, Certified Pest Operator, Florida Irrigation

o License No. Can Provide Expiration Date Can Provided

o Qualifying individual Kyle Stoudenmire, Kyle Davis Title Managers

o List company(s) currently qualified under this license _____
Can provide in more detail if needed

7.2 Is the Proposer company a registered or licensed Contractor with Duval County? yes (X) no ()

7.3 Has the Proposer company performed work for a community development district previously? yes (X) no ()

8. List the Proposer's total annual dollar value of work completed for each of the last three (3) years starting with the latest year and ending with the most current year (2020) 279,000,000, (2021) 340,000,000, (2022) 539,000,000.

9. What are the Proposer's current insurance limits?

General Liability \$ 2,000,000
 Automobile Liability \$ 1,000,000
 Workers Compensation \$ 1,000,000
 Expiration Date 4/31/24

10. Has the Proposer been cited by OSHA for any job site or company office/shop safety violations in the past two years? yes () no (X)

If yes, please describe each violation, fine, and resolution _____

11. Please state whether or not the Proposer or any of its affiliates are presently barred or suspended from bidding or contracting on any state, local, or federal-aid contracts in any state(s)? Yes _____ No (X) If so, state the name(s) of the company(ies) _____

the state(s) where barred or suspended _____
 state the period(s) of debarment or suspension _____

12. What is the landscape and irrigation maintenance experience of the proposed superintendent and project manager?

INDIVIDUAL'S NAME	PRESENT POSITION OR OFFICE	MAGNITUDE AND TYPE OF WORK	YEARS OF LANDSCAPE AND IRRIGATION MAINTENANCE EXPERIENCE	YEARS WITH FIRM	IN WHAT CAPACITY?
Mike Scuncio	Yes	Management	12 years	5	Manager
Cheyne Solesbee	Yes	Branch Manager	18 years	18	Manager
Jack Thompson	Yes	Irrigation Mngr.	25 years	20	Manager

13. Has the Proposer ever failed to complete any work awarded to it? Yes _____ No (X)
 If so, where and why? _____

14. Has any officer or partner of the Proposer ever been an officer, partner, or owner of some other organization that has failed to complete a landscape and irrigation maintenance contract?

Yes _____ No X _____ If so, state name of individual, other organization and reason therefore. _____

15. List any and all litigation to which the Proposer has been a party in the last five (5) years.
N/A

16. Has the Proposer or any of its affiliates ever been either disqualified or denied prequalification status by a governmental entity? N/A If so, discuss the circumstances surrounding such denial or disqualification as well as the date thereof. _____

17. Within the past five (5) years, has the Proposer failed to complete a project within the scheduled contract time? N/A If so, discuss the circumstances surrounding such failure to complete a project on time as well as the date thereof. _____

18. Please state whether or not the Proposer has completed background checks on all of its employees who will or may be providing services at the Bartram Springs Community Development District? Yes X No _____ If no, please state the date by which the Proposer will assure to the District the completion of such background check.

[CONTINUED ON FOLLOWING PAGE]

The undersigned hereby authorize(s) and request(s) any person, firm or corporation to furnish any pertinent information requested by the Bartram Springs Community Development District or their authorized agents, deemed necessary to verify the statements made in this document or documents attached hereto, or necessary to determine whether the Bartram Springs Community Development District should qualify the Proposer for bidding on its landscape and irrigation maintenance project, including such matters as the Proposer's ability, standing, integrity, quality of performance, efficiency and general reputation

Yellowstone Landscape
Name of Proposer

By: Cheyne Solosbee

Cheyne Solosbee - Branch Manager
[Type Name and Title of Person Signing]

This 18 day of January, 2023.

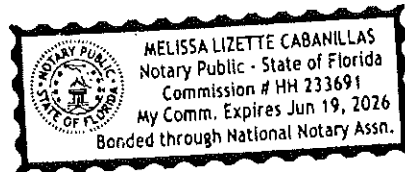
(Corporate Seal)

Sworn to before me this 17th day of January, 2023.

Melissa Lizette Cabanillas

(Seal)

Notary Public/Expiration Date



CORPORATE OFFICERS

Company Name Yellowstone Landscape

Date 1/18/24

Provide the following information for Officers of the Proposer and parent company, if any.

NAME FOR PROPOSER	POSITION OR TITLE	CORPORATE RESPONSIBILITIES	INDIVIDUAL'S RESIDENCE CITY, STATE
Harry Lamberton	CEO	CEO	Atlanta, GA
Brian Wester	RVP	Operations Southeast	Keystone Heights, FL
James Herth	VP Sales	Business Development	St. Augustine, FL
Chris Adornetti	Controller	Accounting	St. Augustine, FL
Elise Johnson	VP HR	Human Resources	St Johns, FL
FOR PARENT COMPANY (if applicable)			

**SUPERVISORY PERSONNEL
WHO WILL BE INVOLVED WITH THE WORK**

PROPOSER: Yellowstone Landscape

DATE: 1/18/24

INDIVIDUAL'S NAME	PRESENT TITLE	JOB RESPONSIBILITIES	OFFICE LOCATION	% OF TIME TO BE DEDICATED TO THIS PROJECT / # OF DAYS ON-SITE PER WEEK	YEARS OF EXPERIENCE IN PRESENT POSITION	TOTAL YEARS OF RELATED EXPERIENCE
Cheyne Solesbee	Branch Manager	Oversees Ops	Jax	50□	8 years	18 years
Blake Dougherty	Bus. Dev. Man.	Business Development	Jax	25□	5 years	17 years
Brad Poor	AM	Account Manager/Bus. Dev.	Jax	50□	5 years	13 years
Joe Soenksen	AM	Account Manager	Jax	75□	2 years	15 years
Marcus Mozingo	Irr. Man.	Irrigation Manager	Jax	20□	10 years	17 years
Jack Thompson	Irr. Man.	Irrigation Manager	Jax	20□	12 years	27 years
Garrett Cannady	OM	Operations Manager	Jax	20□	3 years	12 years
Kyle Stoudenmire	RBD	Regional Bus. Dev.	Jax	10□	1 year	15 years
Kyle Davis	C/F M	Chem/Fert Manager	Jax	10□	6 years	25 years
Rae Roberts	C/F M	Chem/Fert Manager	Jax	10□	10 years	25 years



YELLOWSTONE
LANDSCAPE

Our Team

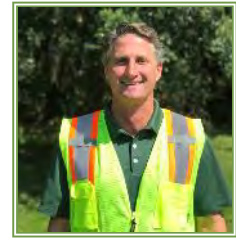




YELLOWSTONE
LANDSCAPE

YOUR JACKSONVILLE TEAM

Team Member: Cheyne Solesbee
Years in the Industry: 17
Position: Branch Manager
Education: Texas A&M—Agronomy and Turfgrass Management
Certifications: Florida Best Management Practices



Team Member: Garrett Cannady
Years in the Industry: 12
Position: Operations Manager
Phone: Georgia—BS, Turfgrass Management
Experience: PGA Tour
TPC Sawgrass



Team Member: Brad Poor
Years in the Industry: 13
Position: Business Development Manager
Education: Florida - BS, Food and Resource Economics
Certifications: FNGLA - Certified Horticulture Professional
UF Best Management Practices
Limited Commercial Fertilizer



Team Member: Blake Dougherty
Years in the Industry: 17
Position: Business Development Manager
Education: Santa Fe - Building Construction
Certifications: Storm Water Management Certified, OSHA 10



YOUR TEAM



Team Member: Kyle Stoudenmire
Years in the Industry: 15
Position: Regional Business Development Manager
Education: Auburn - BS, Landscape Horticulture
Certifications: FL Irrigation Contractor's License - ISA Certified Arborist - Certified Pesticide Operator - UF Best Management Practices - FNGLA Certified Horticultural Professional - OSHA-10 Certified



Team Member: Kyle Davis
Years in the Industry: 25
Position: Chemical/Fertilization Manager
Certifications: Certified Pest Control Operator
UF Best Management Practices



Team Member: Joe Soenksen
Years in the Industry: 15
Position: Account Manager
Education: Iowa State - BS, Horticulture
Certifications: BMP and Commercial Applicator

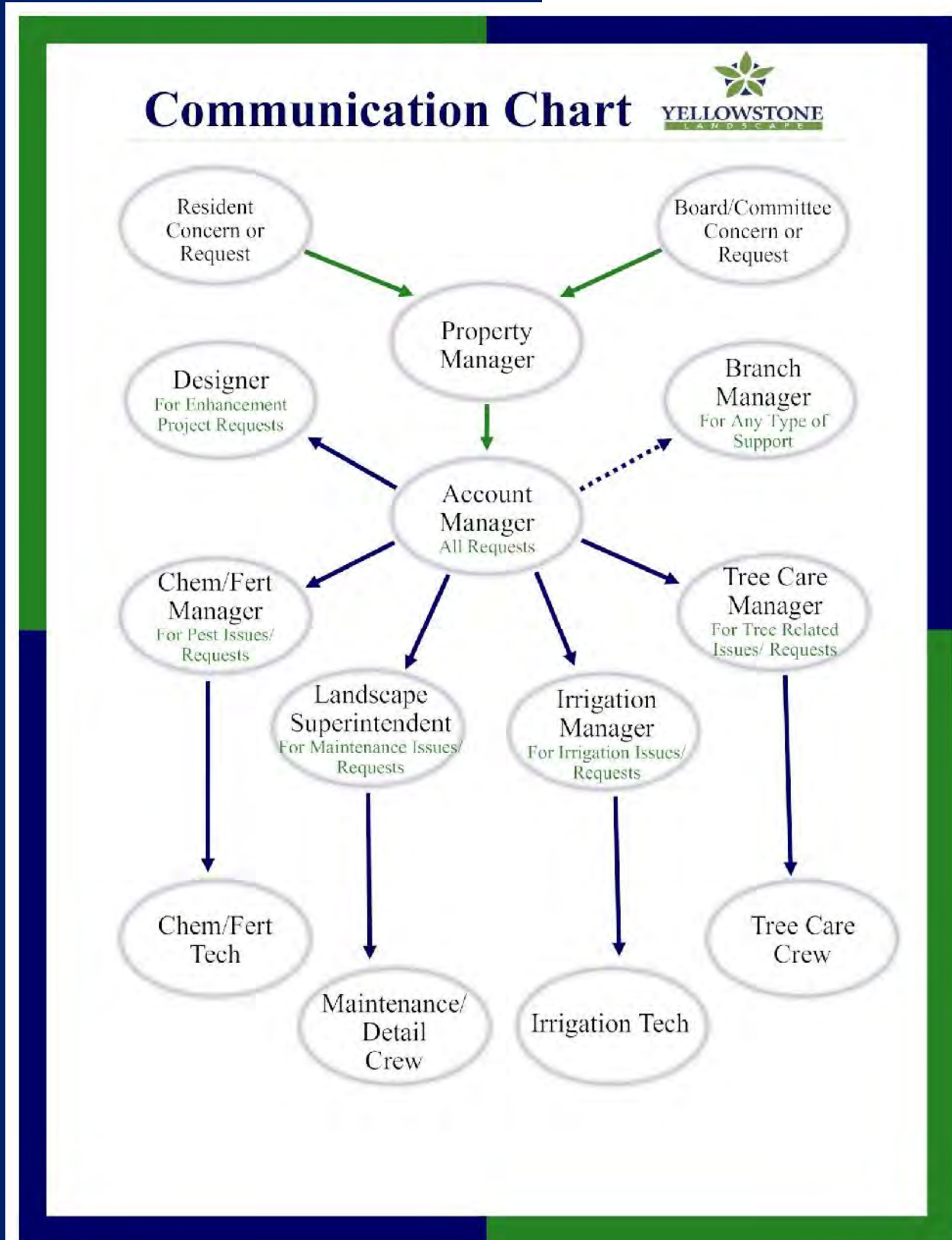


Team Member: Jack Thompson
Years in the Industry: 27
Position: Irrigation Manager
Certifications: Hunter/Rain Bird Certified
FL Irrigation Society - Irrigation Site Manager



COMMUNICATION

The image below depicts the ideal flow of communication between the property and Yellowstone.



Labor - Our Frontline Team

The most important people who make it happen for us on your property
How we attract and keep the best of the best



This article was originally published 12.22.2021 on *The Yellowstone Landscape Blog*.

There's no denying the fact that like so many other industries right now, there have been significant labor shortages in landscaping. We understand that you might have heard about this on the news or from other sources, and it might have you concerned about how it will affect your property.

While it's true that labor shortages in the Green Industry are a major problem right now, the good news is that Yellowstone Landscape has been incredibly proactive in addressing this problem and that's worked in our favor, even during some of the difficult times.

While we certainly aren't immune to the labor shortage issue, we do feel that we are doing all we can to keep our teams at full staff.

In this article, we'll explain how we are addressing labor shortages in the Green Industry so that they don't become a problem for the clients that we work with. We are incredibly committed to both our team and our clients and we continue to strive for the best for both, even during difficult times.

We Offer "FLIP" to our Front Line Employees

We want to pull back the curtain to let you know about one of our inside programs, FLIP, which stands for the Front Line Incentive Program. This is something that we have been doing long before the labor shortages in landscaping became a national problem.

Front-line workers who start the season with us in March or April (whenever the season kicks off in their area), and who show up every day and do the hard work, will earn a seasonal bonus that we pay out just before Thanksgiving.



This is a check for up to \$2,000, depending upon their tenure.

This is an extra bonus with no special work that has to be done—the team literally just has to show up and work safely. This past season we distributed \$2.4 Million to 1,800 of our front-line workers across the country.

It's some nice extra money right before the holidays (aptly timed!) and it's our way of saying that we know our labor force is our most visible workers and we have a lot of respect for them. We rely on these team members and we want them to know that we value their hard work.

We Already Pay Some of the Highest Wages in the Industry

Of course, we understand that the bonus wouldn't be terribly helpful if we weren't already paying our team members well. It's important to note that we are already paying some of the highest wages in the Green Industry.



Again, this is something that we have been doing long before the labor shortages in landscaping started making national news.

We understand that in order to hire **the best people out there, you have to pay for it.** As a commercial landscaping provider we strive to be at the top of the industry, so we know that we must pay a higher wage to attract the best people. It's one of the reasons why we've also been able to retain so many of our staff over the years.

This is a time when many companies are suddenly scrambling to offer more money because they realize they hadn't been paying enough to attract workers. But we've always been focused on this philosophy, not in a desperate attempt to attract anyone that we can but rather to attract **the best talent out there.**

Not all companies are able to do this, but as a large, national company we have the resources to make this possible.

We are Always Hiring and We Incentivize Recruitment Efforts

Another key way that we are addressing labor shortages in landscaping is that we are always actively recruiting. We are always looking for great people. This includes efforts such as online applications and a lot of participation in job fairs and other hiring events. We take the approach that we never want to be stagnant in hiring and reach a point where we're desperately looking to fill a need.

Instead, by always hiring we are constantly bringing in new people who enhance our team.



Our efforts to constantly bring in highly qualified new people also include incentivizing our team members to do some of our recruiting work for us. After all, we have found some of the best people from our existing wonderful team members. They know our company better than anyone and they understand what we're looking for.

This comes from the idea that if you are a great worker already doing a great job, maybe you know other great workers (like friends or family members) who would also want to come work for us.

If our employees bring in more good people, they get paid for that effort.



This often becomes a competition every year as the team wants to be the person who brought in the most qualified workers. For example, we had a team member recruit 17 new employees in 2021, and he got paid \$5,000 for those efforts.

We had another two team members who each brought in 10 people and they each got paid a \$2,000 bonus for those recruitments.

COMPANY OWNED MAJOR EQUIPMENT
(Attach additional sheets if necessary)

Company Name _____

Date _____

QUANTITY	DESCRIPTION	CAPACITY	NO. LOCATED IN	
			FLORIDA	OTHER
	****Please see attached.			

Listing of Major Equipment - JAX



Below is a summary listing of fleet vehicles and major equipment currently owned or leased within the Yellowstone Landscape, Southeast Region.

Vehicle/Equipment	Quantity
Mowers (Various Sizes)	>60
Heavy Duty Pickup Trucks	>40
Irrigation Trucks/Vans	>10
Water Tank Truck	1
Motorized Work Carts	8
Grapple, Boom, Chip Truck, Chipper (2 arbor crews)	1/each item listed
Heavy Construction Equipment (Various Caterpillar)	8
Water Truck	1
Leaf Vacuum Trailer	1
Tractors with Bush Hog Attachments	2

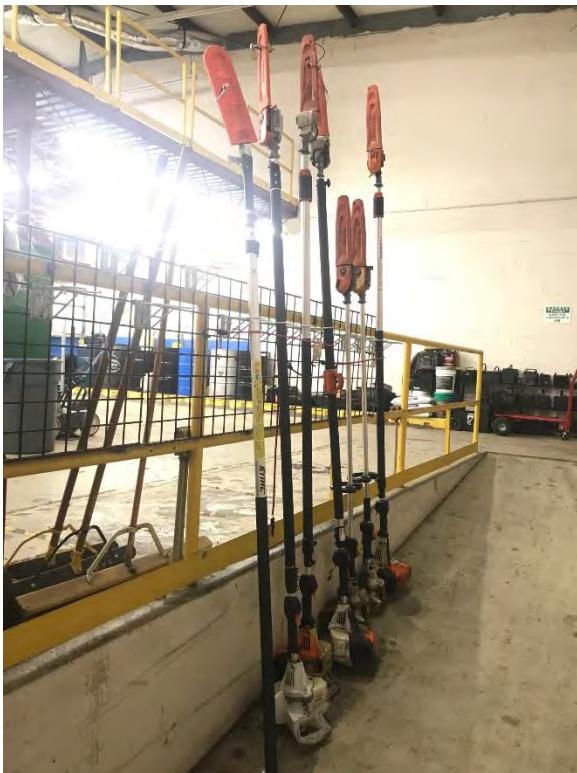
Listing of Major Equipment - JAX



Crew Trucks



2 - cycle equipment



Pole Saws



Mowers

Listing of Major Equipment - JAX



Heavy Machinery



Leaf Vacuum



Tractor with Bus Hog



Spray Rigs for Chemical/Fert Dept.

STATUS OF CONTRACTS ON HAND
(Attach additional sheets if necessary)

Company Name Yellowstone Landscape

Date 1/18/24

Furnish requested information about all of Proposer's active contracts, whether as prime or subcontracts; whether in progress or awarded but not yet started; and regardless of with whom contracted. All amounts to be shown to nearest \$1,000. Contractor may consolidate and list as a single item all contracts which individually do not exceed 3% of total active contracts and in total do not exceed 20% of the active total contracts.

Owner, Location and Description of Project	Current Contract Amount as Prime	Current Contract Amount as Subcontractor	Current Amount Sublet to Others	Proposer's Uncompleted Amount as of this Date		Completion Date		
				As Prime Contractor	As Subcontractor	Original Contract Date	Approved Revised Date	Current Estimate Date
Queens Harbour Yacht & CC	\$ +700K	\$ +100k	\$	\$	\$	2020		Current
RiverTown CDD	\$ 2,000,000	\$ +100k	\$	\$	\$	2022		Current
Durbin Crossing CDD	\$ +500k	\$ +50k	\$	\$	\$	2022		Current
Coastal Oaks	\$ +500k	\$ +50k	\$	\$	\$	2016		Current
Julington Lakes	\$ +300k	\$ +50k	\$	\$	\$	2019		Current
Celestina	\$ +300k	\$ +20k	\$	\$	\$	2016		Current
Meadowview @ Twin Creeks	\$ +600k	\$ +100k	\$	\$	\$	2019		Current
Bartram Ranch	\$ +100k	\$ +20k	\$	\$	\$	2021		Current
WaterSong @ RiverTown	\$ +200k	\$ +30k	\$	\$	\$	2019		Current
	\$	\$	\$	\$	\$			
	\$	\$	\$	\$	\$			
	\$	\$	\$	\$	\$			
	\$	\$	\$	\$	\$			
Subtotal Uncompleted Work				\$	\$			
Total Uncompleted Work on Hand					\$			

REFERENCES

At Yellowstone Landscape, we pride ourselves on building lasting relationships with our clients. These clients have entrusted us as their landscape maintenance partner and would be happy to speak with you about our firm and the services that we provide for them.



POA PROJECT NAME:

Queen's Harbour
238 Queens Harbor Blvd,
Jacksonville, FL 32225

CLIENT CONTACT:

Steven Sheremata
Property Manager

P: (904) 221-8859

SERVICES PROVIDED:

Landscape/Irrigation
Maintenance, Landscape
Design, Landscape
Enhancement



CDD PROJECT NAME:

**RiverTown (Rivers Edge
CDD)**
160 RiverGlade Run,
Saint Johns, FL 32259

CLIENT CONTACT:

Jason Davidson
General Manager
P: (904) 440-5668

Kevin McKendrie
*Field Operations
Manager*

P: (904) 607-1038

SERVICES PROVIDED:

Landscape/Irrigation
Maintenance, Landscape
Design, Landscape
Enhancement



CDD PROJECT NAME:

**Meadowview at Twin
Creeks CDD (Beacon
Lake)**
850 Beacon Lake
Parkway, St. Augustine,
FL 32095

CLIENT CONTACT:

Rich Gray
*Operations
Manager(Riverside
Management)*
P: (865) 438-3977

Danielle Simpson
*Manager of Operations
Beacon Lake(BBX
Capital)*
(602) 373-7227

SERVICES PROVIDED:

Landscape/Irrigation
Maintenance, Landscape
Design, Landscape
Enhancement



HOA PROJECT NAME:
Coastal Oaks at Nocatee
600 Bluewater Drive,
Ponte Vedra Beach, FL
32081

CLIENT CONTACT:
Sue Cart
Board President
P: (203) 556-7063

SERVICES PROVIDED:
Landscape/Irrigation
Maintenance, Landscape
Design, Landscape
Enhancement



HOA PROJECT NAME:
**WaterSong at
RiverTown**
15 Juniper Hills Drive,
Saint Johns, FL 32259

CLIENT CONTACT:
Mariah Cedeno
Community Association
Manager
P: (904) 531-9230

SERVICES PROVIDED:
Landscape/Irrigation
Maintenance, Landscape
Design, Landscape
Enhancement



HOA PROJECT NAME:
Bartram Ranch
50 Morning Mist Ln
Saint Johns, FL 32259

CLIENT CONTACT:
Christine Stubbs
Community Development
Manager
P: (904) 347-5090

SERVICES PROVIDED:
Landscape Construction,
Landscape/Irrigation
Maintenance, Landscape
Design, Landscape
Enhancement



CDD PROJECT NAME:
Durbin Crossing CDD
145 South Durbin Pkwy,
Saint Johns, FL 32259

CLIENT CONTACT:
Margaret Alfano (Vesta)
General Manager

P: (904) 230-2011

SERVICES PROVIDED:
Landscape/Irrigation
Maintenance, Landscape
Design, Landscape
Enhancement



HOA PROJECT NAME:
Julington Lakes
770 Julington Lakes Dr,
Saint Johns, FL, 32259

CLIENT CONTACT:
Laurie Larson
Landscape Committee
Chair

P: (262) 745-3893

SERVICES PROVIDED:
Landscape/Irrigation
Maintenance, Landscape
Design, Landscape
Enhancement



HOA PROJECT NAME:
Celestina
35 Mandara Way
Saint Johns, FL 32259

CLIENT CONTACT:
Scott Forshey-Friedman
Board President

P: (904) 521-5725

SERVICES PROVIDED:
Landscape Construction,
Landscape/Irrigation
Maintenance, Landscape
Design, Landscape
Enhancement

PROJECTS PROPOSER COMPLETED IN THE LAST TWO YEARS

Company Name Yellowstone Landscape

Date 1/28/24

List all projects completed in the last two years for which the contract value individually exceeded 3% of the Proposer's annual total work completed for the year the project was started. Include in the list projects that were started earlier than two years but were completed within the last two years.

Project Name/Location	Final Contract Amount	Prime or Sub ¹	Classification of Work Performed	Year Started/ Completed	Owner Name/Location ²	Name & Phone Number of Owner's Representative on this Project ³
Bartram Ranch Amenity Center	+300k	Prime	Installation	2022	Toll Brothers/SJC	Christine Stubbs
Imeson Industrial	+100k	Prime	Installation	2024	Merrit Properties/Duval	Chris Morris
Mill Creek Phases 2-5	+500k	Prime	Installation	2023	Toll Brothers/SJC	Christine Stubbs
Mill Creek Amenity	+300k	Prime	Installation	2023	Toll Brothers/SJC	Christine Stubbs
Costco-Daytona	+800k	Prime	Installation	2024	Wynn Construction	Dick Wynn

¹ 'Prime or Sub' should indicate whether Proposer performed the work as a prime contractor or as a subcontractor.

² 'Owner Name/Location' should indicate the Owner of the project if the Proposer performed the work as a prime contractor or the general contractor if the Proposer performed the work as a subcontractor.

³ 'Name & Phone Number of Owner's Representative on this Project' should list a reference from the business entity listed in the previous column familiar with Proposer's contract performance.

AFFIDAVIT FOR CORPORATION

State of Florida
County of Duval

SS:

Cheyne Solesbee
(title) Branch Manager
of the Yellowstone landscape

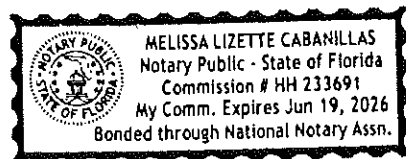
(a corporation described herein) being duly sworn, deposes and says that the statements and answers to the questions in the foregoing concerning experience are correct and true as of the date of this affidavit; and, that he/she understands that intentional inclusion of false, deceptive or fraudulent statements in this statement constitutes fraud; and, that the District considers such action on the part of the Proposer to constitute good cause for rejection of Proposer's proposal.

Cheyne Solesbee
(Officer must also sign here)

CORPORATE SEAL

Sworn to and subscribed before me this 17th day of January, 2023, by _____ of the _____

Melissa Cabanillas
(Official Notary Signature & Seal)
Name: MELISSA CABANILLAS
Personally Known _____
OR Produced Identification HH 233691
Type of Identification _____



**SWORN STATEMENT PURSUANT TO CHAPTER 287, *FLORIDA STATUTES*, ON
INTEGRITY OF PUBLIC CONTRACTING AND PURCHASING**

**THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC
OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.**

1. This sworn statement is submitted to Bartram Springs Community Development District (“District”)
(print name of the public entity)

by Cheyne Solesbee, Branch Manager
(print individual's name and title)

for [NAME OF PROPOSER] (“Proposer”) Yellowstone Landscape
(print name of entity submitting sworn statement)

whose business address is

2663 Robert Street Jacksonville, FL 32207

and (if applicable) its Federal Employer Identification Number (FEIN) is 202993503

(If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement)

2. I have read and am familiar with Chapter 287, *Florida Statutes*, and specifically including the following Sections (“Public Integrity Laws”):
- a. Section 287.133, *Florida Statutes*, titled *Public entity crime; denial or revocation of the right to transact business with public entities*;
 - b. Section 287.134, *Florida Statutes*, titled *Discrimination; denial or revocation of the right to transact business with public entities*;
 - c. Section 287.135, *Florida Statutes*, titled *Prohibition against contracting with scrutinized companies*;
 - d. Section 287.137, *Florida Statutes*, titled *Antitrust violations; denial or revocation of the right to transact business with public entities; denial of economic benefits*; and
 - e. Section 287.138, *Florida Statutes*, titled *Contracting with entities of foreign countries of concern prohibited*.
3. I understand that the Public Integrity Laws, with limited exceptions, prohibit entities that meet certain criteria from bidding on or entering into or renewing a contract with governmental entities, including with the District (“Prohibited Criteria”).
4. I understand that the Public Integrity Laws apply to the bidding documents applicable to the District’s Request for Proposals for Landscape and Irrigation Maintenance Services Project (“Project”) and the contract to be executed in connection with the Project.
5. Based on information and belief, the statement which I have marked below is true in relation to the Proposer submitting this sworn statement. (Indicate which statement applies.)

X

Neither the entity submitting this sworn statement, nor any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity, meets any of the Prohibited Criteria. Thus, the entity is not prohibited from bidding on or entering into or renewing a contract with the District.

—

The entity submitting this sworn statement, one of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity, meets one or more of the Prohibited Criteria.

If this statement is marked, the Proposer may provide additional information regarding the same in the space provided directly below (or by attaching a separate sheet and indicating this method in the space provided directly below). Such additional information may be related to the Proposer's alleged basis for entitlement to an exception from the prohibition on bidding or contracting, to the extent one is permissible under Florida law.

6. If awarded the contract, the Proposer will immediately notify the District in writing if either the Proposer, any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or any affiliate of the entity, meets any of the Prohibited Criteria after award of the contract or during the term of the contract.

[Signature page follows]

IT SHALL BE THE RESPONSIBILITY OF THE PROPOSER EXECUTING THIS AFFIDAVIT TO VERIFY THAT NONE OF THE SUBCONTRACTORS/SUPPLIERS UTILIZED FOR THIS BID/QUOTE MEET ANY OF THE PROHIBITED CRITERIA. IN THE EVENT IT IS LATER DISCOVERED THAT A SUBCONTRACTOR/SUPPLIER MEETS ANY OF THE PROHIBITED CRITERIA, THE PROPOSER SHALL SUBSTITUTE THE SUBCONTRACTOR/ SUPPLIER WITH ANOTHER WHO DOES NOT MEET ANY OF THE PROHIBITED CRITERIA. ANY COST ASSOCIATED WITH THIS SUBSTITUTION SHALL BE THE SOLE RESPONSIBILITY OF THE PROPOSER.

The foregoing SWORN STATEMENT is dated this 17th day of January, 2023.

(Corporate Seal, if applicable)

Yellowstone Landscape
(Name of Proposer)

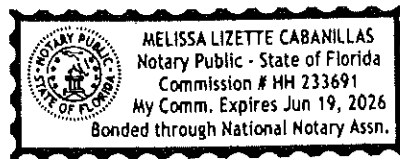
By: Cheyne Solesbee

Title: Branch Manager

STATE OF Florida
COUNTY OF Duval

The foregoing instrument was sworn and subscribed before me by means of physical presence or online notarization, this 17th day of January, 2023, by _____ of _____, who is personally known to me or who has produced _____ as identification, and did [] or did not [] take the oath.

Notary Public, State of Florida
Print Name: MELISSA CABANILLAS
Commission No.: HH233691
My Commission Expires: JUNE 19 2026





YELLOWSTONE
LANDSCAPE

Scope of Services



SCOPE OF SERVICES – LANDSCAPE

Bartram Springs CDD

PART 1

GENERAL LANDSCAPE MAINTENANCE

1) MOWING – All grass areas will be mowed on the following schedule; however, Bermuda grass will be mowed once a month November 1 - March 1 and such reduced schedule shall be reflected in Contractor's pricing:

MARCH 1 – NOVEMBER 1 – Once a week

NOVEMBER 1 – MARCH 1 – Once every two weeks

This schedule estimates that there will be between 41 – 45 cuts annually based on standard growing periods in Florida, however, requires a minimum of 52 visits (weekly) to perform those duties, other than mowing, which cannot remain unattended for two weeks. (i.e., weed control, selective mowing, landscape detailing, debris clearing, etc.) Notwithstanding the above, at no time will the Bahia grass (ponds) be allowed to grow beyond a maximum height of four (4) to four and one half (4 ½) inches and Bermuda grass shall never be allowed to grow beyond a maximum height of two (2) inches. Each mowing should leave the Bahia grass at a height of three (3) to three and one half (3 ½) inches and Bermuda at a height of one (1) to one and one half (1 ½) inches. St. Augustine shall never be allowed to grow beyond five and one half (5 ½) inches. Optimum height for Bermuda should be approximately one and one half (1 ½”) to encourage deeper root growth. Rotary Mowers are preferred for heights above one (1) inch. All blades shall be kept sharp at all times to provide a high-quality cut and to minimize disease. If the swales located throughout the property are filled with rainwater or are too soft to mow without leaving ruts from the mowers in the swales, contractor shall use line trimming to properly maintain the grasses. The district requires mowers to be equipped with a mulching type of deck. Clippings may be left on the lawn if no readily visible clumps remain on the grass surface thirty-six hours after mowing. Otherwise, large clumps of clippings will be collected and removed by the Contractor. In case of fungal disease outbreaks, the clippings will be collected until the disease is under control. The Contractor shall restore any noticeable damage caused by the Contractor’s mowing equipment within forty-eight hours from the time the damage is caused at his sole cost and expense. The contractor shall be responsible for training all its personnel in the technical aspects of the Bartram Springs Landscape Maintenance Program and general horticultural practices. This training will also include wetland species identification as it relates to lake banks & wetland areas. The Contractor shall be held responsible for all damage to wetlands, littoral shelves, mitigation areas and uplands due to mowing/fertilizing, etc. Weekend work is permitted, when necessary, upon prior approval.

1A) POND MOWING - All ponds (32) identified as such on the overall Bartram Springs CDD Maintenance Exhibit/Plans shall be mowed incorporating the same mowing schedule as the common areas stated above. Each mowing shall leave the grass at a height of four

(4) to four and one half (4½) inches. Pond banks will be mowed and/or trimmed to water's edge. Line trimming at water's edge and line trimming of drainage structures shall occur every time the pond is mowed. Careful attention must be paid to mower height on pond banks so as not to scalp at the crest of the lake bank and increase the chances for pond bank erosion. Also, when line trimming to water's edge, Contractor shall be extremely careful not to scalp at the water's edge also increasing chances of pond bank erosion. Line trimming height shall be the same as mowing height (if not slightly higher). Contractor shall be careful to keep trimmings from entering water. Excessive clippings shall be hand removed. Mowers must blow all clippings away from pond banks. It is understood that trash of any kind and other debris within arm's reach of water's edge shall be removed & disposed of by Contractor during every normal service event. Unless otherwise designated on Maintenance Exhibit/Plans, homeowners are responsible for mowing down to the water's edge behind their property.

The Contractor shall mow within the Contract Areas 1 thru 4 as described below (shown on the Maintenance Map). The **growing season** shall be defined as April 1 through October 31. The **dormant season** shall be defined as November 1 through March 31. Each mowing shall be completed for the entire contract area within four (4) days after commencement of the mowing.

AREA 1: Entry Roadways, Amenity Site & Sports Park - 1 time per week during the growing season and twice a month during the dormant season, for a total of 41 cuts. Bermuda grass shall be maintained at a 2" height.

AREA 2: Roadside Common Area - 1 time (bi-weekly) every fourteen (14) calendar days during the growing season and once a month during the dormant season, for a total of 21 cuts.

AREA 3: Ponds 1 time (bi-weekly) every fourteen (14) calendar days during the growing season and once a month during the dormant season, for a total of 21 cuts.

AREA 4: Drainage Easements These (4) four areas indicated on the maintenance map shall be mowed from the resident property line to the bottom of the berm and/or fence. The mowing frequency will be determined by owner/district representatives. This service shall be accomplished with a bush hog or rotary mower.

2) EDGING AND TRIMMING – All hard-edged areas (curbs, sidewalks, bike paths, nature trails, etc.) and soft-edged areas (tree rings, shrub, and groundcover bed lines) shall be edged during each mowing event. All edging shall be performed to the sole satisfaction of the DISTRICT. **Chemical edging shall not be permitted anywhere on property.**

AT NO TIME SHALL LAWN BE ALLOWED TO GROW IN AN UNSIGHTLY MANNER. SHOULD THIS OCCUR, THE CONTRACTOR AGREES TO CORRECT WITHIN FORTY-EIGHT HOURS OF NOTICE BY DISTRICT.

3) TREE AND SHRUB CARE – Branches will be pruned just outside the branch collar. Branches and limbs shall be kept off buildings, signage structures, play structures, fences & walls as well as pruned to keep streetlights and traffic signage from being blocked to a maximum of twelve (12ft.) Additionally, on an as-needed basis, all trees shall be pruned over sidewalks, conservation areas, parking lots, driveways & roadways so as not to interfere with pedestrians, cars or other vehicles. (This is to include always maintaining a minimum of fourteen and a half (14.5) feet (but shall vary according to DOT specs) of clearance under all limbs depending on location and species of tree.). Aesthetic pruning shall consist of the removal of dead and/or broken branches as often as necessary to have trees always appear neat. Sucker growth at the base of the trees shall be removed by hand continuously throughout the year.

All shrubs will be pruned as necessary to retain an attractive shape and fullness, removing broken or dead limbs as necessary to provide a neat and clean appearance. Shrubs shall not be clipped into balled or boxed forms unless such forms are required by design. Shrubs shall be pruned in accordance with the intended function of the plant in its present location. Flowering shrubs shall be pruned immediately after the blossoms have cured with top pruning restricted to shaping the terminal growth. All pruning shall be done with horticultural skill and knowledge to maintain an overall acceptable appearance consistent with the current aesthetics of the Bartram Springs CDD community. The Contractor agrees that pruning is an art that must be done under the supervision of a highly trained supervisor and shall make provisions for such supervision. Individual plants pruned into rounded balls or unnatural shapes will not be allowed. All clippings and debris from pruning will be carted away at the time pruning takes place.

Palms: All palms shall receive pruning as often as necessary to always appear neat and clean to include after high wind occurrences. This includes brown and/or broken fronds and inflorescence. Removal of green or even yellowing fronds is unnecessary. Fronds should be removed only once they turn brown or become broken or disrupt the flow of pedestrian/vehicular traffic or are hanging on architectural structures. Fruit pods shall be removed prior to development. Tarpaulins shall be used in areas where date palms and other palm fruits may stain sidewalks & pavement including, but not limited to, pool decks. The contractor shall be responsible for the removal of all palm fruit stains. “Hurricane” palm pruning shall never be allowed.

4) WEEDS AND GRASSES – All groundcover and turf areas shall be kept reasonably free of weeds and grasses and be neatly cultivated and maintained in an orderly fashion. This may be accomplished by carefully applied applications of pre & post emergent herbicides as part of fertilizer mixtures and post-emergent herbicide spot treatments on an as-needed basis. The condition of turf is to be determined by the district at its sole discretion. All shrub and bed areas shall be maintained each mowing service by removing all weeds, trash and other undesirable material and debris to keep the area neat and tidy. All ornamental beds, hedge areas and tree rings shall be kept weed (and sod) free throughout the year. This is to be accomplished through hand pulling or the careful

application of a post-emergent herbicide. The contractor shall include the quarterly hand removal of all dog fennel (and other invasives) along the main roadways and view corridors. **AT NO TIME SHALL POST-EMERGENT HERBICIDES BE PERMITTED WHEN WEEDS HAVE ESTABLISHED THEMSELVES AS TO DOMINATE PLANTING BEDS. HAND PULLING MUST BE PERFORMED.**

NON-SELECTIVE, POST-EMERGENT HERBICIDES SHALL NEVER BE USED TO CONTROL WEED/SOD GROWTH AROUND STRUCTURES OF ANY TYPE (I.E. STREET SIGNS, UTILITY BOXES, STREET LIGHTS, PAVEMENT, ETC.) THE FIRST OFFENSE WILL RESULT IN A VERBAL WARNING; THE SECOND OFFENSE WILL RESULT IN A SECOND VERBAL WARNING AND THE BOARD OF SUPERVISORS FOR THE DISTRICT WILL BE NOTIFIED; THE THIRD OFFENSE MAY TERMINATE THIS CONTRACT FOR CAUSE AT THE DISTRICT'S DISCRETION.

The Contractor shall be responsible for the replacement of ornamental plants killed or damaged by herbicide application. All fence lines shall be kept clear of weeds, undesirable vines, and overhanging limbs.

5) MAINTENANCE OF PAVED AREAS – All paved areas shall be kept weed free. This may be accomplished by mechanical means (line trimmer) or by applications of post/pre-emergent herbicides. Weeds greater than two (2) inches in height or width shall be pulled from paved areas, not sprayed. No sprays with dyes may be used on any paved areas.

6) CLEAN UP – At no time will Contractor leave the premises after completion of any work in any type of disarray. All clippings, trimmings, debris, dirt, or any other unsightly material shall be removed promptly upon completion of work. The contractor shall use his own waste disposal methods, never the property dumpsters. Grass clippings, leaves and vegetative debris shall be blown off sidewalks, streets, and curbs into the turf areas, never into mulched bed areas as these are to be maintained free of grass clippings and weeds. **NO CLIPPINGS SHALL BE BLOWN DOWN CURB INLETS.** At no time shall the clippings be left on the sidewalks, streets, and curbs overnight. The contractor shall be responsible for blowing grass clippings, leaves, vegetative debris, and other debris off pool decks, volleyball and basketball courts, and parking lots at the time of service.

During months of heavy leaf fall, the Contractor will remove leaves from turf areas (including medians) and haul away to prevent leaves from matting atop turf and to allow for proper maintenance and weed control.

7) TRASH REMOVAL - The Contractor will, prior to mowing, pick up all bottles, cans, fallen limbs and palm fronds and other debris and trash on the property including bogus signs such as "For Sale" signs displayed in rights-of-way and common areas by owners and realtors.

8) STAFFING - Minimum staffing requirements shall be as follows:

<i>Time Period</i>	<i>Crew Size</i>	<i>Hours</i>
May 1 to September 30	5 (4 crew members and 1 leader)	8 hours a day, 2 days a week, monthly.
October 1 to April 30	4 (4 crew members and 1 leader)	8 hours a day, 2 days a week, bi-monthly

Any enhancements beyond the scope of this Agreement and authorized by the district must be installed by additional crew members unless use of the standard required crew is approved by the district. The district's authorization of additional work or enhancements shall not relieve the Contractor of its obligations under this Agreement.

9) REPLACEMENT OF PLANT MATERIAL – Tree and shrubs in a state of decline should immediately be brought to the attention of the district. Dead or unsightly plant material shall be removed expeditiously upon notification of the district. The contractor shall be responsible for replacement if due to his negligence. New plant material shall be guaranteed for a period of one (1) year for trees and ninety (90) days for shrubs, ground cover and lawn after final acceptance. The contractor will replace said dead or unsightly plant material not to exceed \$ 200.00 per month with the approval of the Field Operations Manager.

Any turf, shrubs, trees that die because of the Contractor's failure to maintain the irrigation system as specified in Part 4 shall be replaced at the Contractor's expense.

10) SEASONAL COLOR/ANNUALS - A schedule of all annual plant options will be discussed with the Field Operations Manager or General Manager prior to installation to ensure the choice of plant pattern and plants are conducive to that season. Annuals shall be changed out in four cycles yearly – Spring (March), Summer (June), Fall (September) and Winter (December). Color and species shall be approved by the District prior to installation. Additional soil amendments, fungicides and insect applications will be performed to maintain vigorous growth and color.

11) MAKE UP DAYS - If Contractor misses a service due to inclement weather or any other reason, he is required to make up service the same week.

PART 2
FERTILIZATION

Contractor must comply with the St. Johns and Duval County Fertilizer Ordinance in total.

All turf shall be fertilized according to the following IFAS Guidelines for a high maintenance level for northeast Florida turf, which is outlined below. It is incumbent upon the Contractor to review such guidelines for conformance with northeast Florida recommendations.

All Bahia Sod:

March	A complete fertilizer based on soil tests + Pre-M
April	Nitrogen (soluble Nitrogen applied at 0.5 lbs. N/1000 SF)
June	SRN (Slow-Release Nitrogen applied at 1.0 lbs. N/1000 SF)
August	Fe For foliar application, use ferrous sulfate (2 oz. /3-5 gal. H ₂ O/1,000 SF)
October	A complete fertilizer based on soil tests + Pre-M

All Bermuda Sod:

March	A complete fertilizer based on soil tests + Pre-M
April	N (Soluble Nitrogen applied at .5 lbs. N/1000 SF)
May	SRN (Slow-Release Nitrogen applied at 1.0 lbs. N/1000 SF)
July	A complete fertilizer based on soil tests.
August	Fe (for foliar apps, use ferrous sulfate @ 2 oz. /3-5-gal H ₂ O/1000 SF). If Fe is applied to an acidic soil, use 1 lb. of iron sulfate/1000 SF. If soil is calcareous, use the container label recommended rate of an iron chelate.)
September	SRN (Slow-Release Nitrogen applied at 1.0 lbs. N/1000 SF)
November	A complete fertilizer based on soil tests + Pre-M

All St. Augustine Sod:

February	A complete fertilizer based on soil tests + Pre-M
April	Nitrogen (soluble Nitrogen applied at 0.5 lbs. N/1000 SF)
May	SRN (Slow-Release Nitrogen applied at 1.0 lbs. N/1000 SF)
July	Fe For foliar application, use ferrous sulfate (2 oz. /3-5 gal. H ₂ O/1,000 SF)
August	SRN (Slow-Release Nitrogen applied at 1.0 lbs. N/1000 SF)
October	A complete fertilizer based on soil tests + Pre-M

At times environmental conditions may require additional applications of nutrients, augmenting the above fertilization programs to ensure that turf areas are kept uniformly green, healthy and in top condition. It shall be the responsibility of the contractor to determine specific needs and requirements and notify the resident project representative when these additional applications are needed.

Fertilizers containing iron shall be removed from all hard surfaces to avoid staining before the sprinklers are activated after application of the fertilizer. Any stains caused by a failure to do so will be the responsibility of the contractor to remove.

Soil test samples shall be taken by the contractor to determine the presence of Phosphorus and whether changes in the fertilizer pH or formulations are required. Should changes be of merit, the Contractor shall notify the district in writing prior to the implementation of such changes.

Fertilizer shall be applied in a uniform manner. If streaking of the turf occurs, correction will be required at no additional cost to the District. Fertilizer shall be swept/blown off all hard surfaces onto lawns or beds to avoid staining. **IT SHALL BE THE CONTRACTOR'S RESPONSIBILITY TO REMOVE ANY STAINS FROM ANY HARD SURFACES ON THE PROPERTY CAUSED BY THEIR NEGLIGENCE OF THE FERTILIZER APPLICATION.** Fertilizer shall not be applied within ten (10) feet from the landward extent of any surface water. Spreader deflector shields are required when applying fertilizer by use of any broadcast or rotary spreader. Deflector shields must be positioned such that fertilizer granules are deflected away from all impervious surfaces and surface waters.

VETERANS PARK ANNUAL TREATMENTS, AERIFICATION, FERTILIZATION AND OVERSEEDING

Contractor shall assume the cost for proper treatment to restore the athletic fields to include:

4 aerification and water-soluble nitrogen fertilization during the growing season.

4 applications of complete granular fertilization during the growing season.

4 applications of Primo Max regulator during the growing season.

Top dressing with sand after aeration (4x per year or as required) and weekly mowing with a "reel" mower.

Overseeding both Bermuda Sports Fields at a rate of 8 pounds of Rye Seed per 1000sqft or as needed.

SHRUB, TREE & GROUNDCOVER FERTILIZATION:

For purposes of bidding, all shrubs, groundcovers, and trees shall be fertilized according to the following specifications:

3 Times a year – (March, June, October)

A complete fertilizer (formula will vary according to soil test results) at a rate of 4-6 lbs. N/1000 sq. ft. /year. (A minimum 50% Nitrogen shall be in a slow-release form)

Fertilizer shall be applied by hand in a uniform manner, broadcast around the plants, but never in direct contact with stems or trunks. Fertilizer shall never be piled around plants. All fertilizer remaining on the leaves of the plants is to be brushed or blown off. **IT IS THE CONTRACTOR'S RESPONSIBILITY TO REPLACE ANY PLANT MATERIAL DAMAGED BY FERTILIZATION BURN DUE TO HIS NEGLIGENCE.**

PALM FERTILIZATION:

All Palms shall receive 1 ½ pounds of 8N-2P2O5-12K2O+4Mg with micronutrients per 100 SF of palm canopy four times per year (March, June, September, November). 100% of the N, K & Mg **MUST** be in slow-release form. All micronutrients must be in water soluble form. Fertilizer shall be broadcast evenly under the dripline of the canopy but must be kept at least 6” from the palm trunk.

Fertilizer shall not be billed equally monthly but invoiced the month after application.

Contractor must notify the district 48 hours prior to performing any palm fertilization. Contractor shall provide the DISTRICT with all fertilizer analysis tags from the fertilizer to verify correct formulation and quantity. Payment will not be made until the correct quantity and formulation has been verified and applied. The contractor must notify the district five (5) working days in advance of the day the property is scheduled to be fertilized. Failure on the part of the Contractor to so notify the district may result in the Contractor forfeiting all rights to payment for the applications made without notification.

PART 3 **PEST CONTROL**

INSECTS AND DISEASE IN TURF - Insect and disease control spraying in turf shall be provided by the Contractor every month (or as needed if not required - Contractor should consult with District's Designee if insect/disease control is not required) with additional spot treatment as needed. During the weekly inspections, the Contractor is responsible for the identification and eradication/control of disease and insect damage including but not limited to scale, mites, fungus, chinch bugs, grubs, nematodes, fire ants, mole crickets, etc. The contractor shall pay for the chemicals. Please list all chemicals that you will include in your fertilizer applications in the space allocated for “formula” under the fertilization section in the bid form. Also include the cost of these chemicals as part of the fertilizer application. Any anticipated additional treatments shall be included in the Pest Control portion of the bid form.

INSECTS AND DISEASE CONTROL FOR TREES, PALMS AND PLANTS - The Contractor is responsible for the treatment of insects and diseases for all plants. The appropriate insecticide or fungicide will be applied in accordance with state and local regulations, and as weather and environmental conditions permit. The contractor shall pay for the chemicals. There are several afflictions that may be detrimental to the health of many trees and palms. The contractor will be fully responsible for the treatment of such afflictions. At the District’s discretion, this may include the quarterly inoculation of all palms susceptible to Lethal Yellowing and/or Texas Phoenix Palm Decline. The cost of these inoculations should be included as a separate line item in your Pest Control price. The contractor is to identify those species of palms susceptible and supply a list of species and quantities with a proposal. Each susceptible palm shall receive quarterly injections. Each injection site/valve can be used only twice. The third quarterly injection requires a new valve and injection site. Contractor is asked to provide cost per injection (material & labor)

multiplied by quantity of susceptible palms multiplied by four inoculations per year in bid form. **The District reserves the right to subcontract out all OTC Injection events. This will not be included in the Contract Amount.**

The contractor will perform biweekly inspections of all District owned property at which time a punch list of deficiencies and corrective measures will be presented to the district's Field Operations Manager.

The Contractor is required to inspect all landscaped areas during each visit for indication of pest problems. When control is necessary, it is the responsibility of the Contractor to properly apply low toxicity and target-specific pesticide. If pesticides are necessary, they will be applied on a spot treatment basis when wind drift is not a threat. Top Choice ant bait will be used once annually at the grass areas where special events are held at the Amenity Center or Veterans Park.

Careful inspection of the property on each visit is crucial to maintaining a successful program. It is the Contractor's full responsibility to ensure that the person inspecting the property is properly trained in recognizing the symptoms of both insect infestations and plant pathogen damage (funguses, bacteria, etc.). It is also the Contractor's responsibility to treat these conditions in an expedient manner.

It shall also be the Contractor's responsibility to furnish the resident project representative with a copy of the Pest Management Report which he is to complete at every service as well as all certifications (including BMP Certifications) of all pesticide applicators. The contractor shall familiarize himself with all current regulations regarding the applications of pesticides and fertilizers.

If at any time the district should become aware of any pest problems, it will be the Contractor's responsibility to treat pests within five (5) working days of the date of notification.

FIRE ANT CONTROL

The contractor is required to inspect property each visit for evidence of fire ant mounds and immediately treat upon evidence of active mounds. In small areas control can be achieved by individual mound treatment. Active mounds in larger turf areas will require broadcast application of bait.

For informational purposes only, Contractor is asked to provide the cost for the annual application of Top Choice in all finished landscaped and irrigated areas on the Plans/Maintenance Exhibit. This does not include lake banks behind the residential properties or between ponds and conservation areas.

Pest Control will not be included as a standard line item in each monthly billing but shall be invoiced as a separate line item the month after service is rendered.

Pest Control shall be included in the Contract Amount.

PART 4
IRRIGATION SYSTEM MONITORING AND MAINTENANCE

IRRIGATION SYSTEM. The Contractor shall inspect and test the irrigation system components twice monthly during the growing season (April 1- October 31) and once a month during the dormant season (November 1-March 31). This shall include all the existing irrigation systems. The irrigation system summary table of controllers, zones and clocks are provided to the Contractor herein. All routine repairs shall be included as part of the contracted amount; system integrity repairs that are related to the infrastructural integrity of the irrigation system shall be borne by the district. Should Contractor have a disagreement about the nature of the repair, the Contractor shall work with the District and its Designee in good faith to resolve such disagreement.

A. Irrigation Controllers

1. Semi-automatic start of the automatic irrigation controller.
2. Check for proper operation.
3. Lubricate and adjust mechanical components.
4. Test back up programming support devices.
5. Ensure the proper operation of each automatic rain shutoff device. If none, provide a proposal for the installation to be included in the 30-day irrigation audit.

B. Water Sources

1. Visual inspection of water source.
2. Clean all ground strainers and filters regularly.
3. Test each pump (if applicable) at design capacities **weekly** and inform the District Designee of any problems immediately. This is to minimize the time a water source is down. The contractor shall also confirm weekly that all backflow preventers are on and operating properly, if applicable.
4. Test automatic protection devices.

C. Irrigation Systems

1. Manual test and inspection of each irrigation zone in its entirety.
2. Clean and raise heads as necessary.
3. Adjust arc pattern and distance for required coverage areas.
4. Clean out irrigation valve boxes.
5. Inspect and maintain battery-operated valves throughout the property and replace batteries as needed. The contractor shall be responsible for ordering replacement batteries, the cost of which shall be billed to the district at actual cost with no markup.

D. Report

1. Irrigation operation time.

2. Irrigation start time.
3. Maintenance items performed.
4. General comment and recommendations.

The above list is for routine maintenance and adjustment of the existing irrigation system components. Locating and repairing or replacing automatic valves or control wires and irrigation controller or large-scale repairs are to be considered additional items. **Contractor shall provide a list of additional charges and pricing for such items other than routine maintenance as a separate price from this bid.**

Routine irrigation maintenance is to be completed monthly. Each zone is to be turned on and operated for as long as necessary to verify proper operation. Each head, seal, nozzle, and strainer are to be inspected for adjustment and shall be aligned, packed, cleaned and repaired, as necessary. Shrubs, groundcovers, and turf around sprinkler heads shall be trimmed to always maintain maximum clearance for the greatest coverage. The contractor shall also provide risers as needed to raise heads to a suitable height above plant material, when necessary, at no additional cost to District. All below ground repairs including valves, pumps and wiring require an estimate for all such repairs. Upon written approval from Management, Contractor shall proceed. In the event of an emergency, Contractor shall make a diligent effort to contact, with the approximate price or estimate of repairs, Management, or their assign prior to making such repair.

Upon being awarded contract, Contractor shall have a period of ten (10) business days from date of commencement to perform a thorough audit of the entire irrigation system listing items that need repair/replacement for the system to operate properly. A separate audit may also be provided by the Contractor listing those items that would improve the irrigation system. Any action taken regarding the Irrigation Audit will be at the Board of Supervisors' discretion.

Assuming the Board of Supervisors approves the repairs listed in the 30-day audit and after such repairs have been made, after the ten (10) day period has expired and for the duration of the contract, Contractor shall assume, at no additional cost to the District, responsibility for any and all maintenance deficiencies, including parts and labor, associated with the irrigation system, to include sprinkler heads, nozzles, drip, main and delivery lines and any associated fittings. Said repairs shall be performed immediately. The District's Designee shall be notified what day and time of the week the irrigation tech will be available servicing the community. The Contractor will keep detailed irrigation reports consisting of run times and correct operation of the system. A copy of this report will be maintained by the Contractor and a copy delivered to the District's Designee, along with the weekly report. At no time shall the Contractor leave the property knowing of the need for a repair and not reporting it.

Watering schedules shall meet all government regulations, and zone times will be adjusted depending on job conditions, climactic conditions and all watering restrictions of St. Johns County and Duval County, or any other governmental agencies. It is the responsibility of the Contractor to ensure the turf and plant material remains healthy. If the Contractor finds that the irrigation

system cannot adequately cover the district in the allotted time, it will be the Contractor's responsibility to bring this to the attention of the district representative and apply for a variance. Violations and/or fines imposed by any local or state agency will be deducted from the Contractor's monthly payment.

Emergency service shall be available after normal working hours and an emergency telephone number will be provided to Management.

FREEZE PROTECTION. The Contractor shall describe ability and cost per man-hour to provide freeze protection for both landscape material and pumps/wells.

1. Responsibility for Sprinkler Head Repairs: Contractor shall have sixty (60) days from the effective date of the Agreement to conduct a comprehensive review of the district's irrigation system, including all sprinkler heads, and submit proposals for any items needing repair. After the 60-day period has expired and any necessary repairs have been made, Contractor and District shall share the cost of sprinkler head repairs 50/50; i.e., the Contractor shall bear 50% of the applicable sprinkler head repair costs and the district shall bear 50% of the applicable sprinkler head repair costs. Contractor shall not be responsible for any items identified as needing repair if the district does not authorize the recommended repair.
2. Bid Alternate: Contractor shall submit a price to provide a full time Irrigation Technician / Water Manger to provide routine maintenance as stated in this section, make repairs related to the irrigation systems in the district, manage all controllers to provide seasonal watering requirements and minimize irrigation use when conditions allow. This would replace irrigation inspections totals on the Proposal summaries.

PART 5 **INSTALLATION OF MULCH**

After prior approval by the Board of Supervisors, Contractor shall top dress all currently landscaped areas as shown on the plans/maintenance map (landscaped beds & tree rings) at the Amenity Center and Veterans Park with Brown Cyprus Mulch (or the choice of the designee) in the beds and Pine Straw Mulch on Bartram Springs Parkway. The interior of the dog park area will receive hardwood colored mulch chips to maintain an acceptable depth for the intended use of this area (4-6 inches). All playground areas will be maintained with the certified required depth to follow playground regulations at a minimum of twice (2) per year.

Mulched areas should be raked, leveled, or mulch removed to maintain 3"-4" level of mulch in beds prior to the installation of new mulch. Such an application is expected to be twice per year (May and November). In doing so, Contractor shall ensure that all mulched areas (excluding

playground and dog park) are brought to a minimum depth of three (3) inches after compaction. The contractor is responsible for all necessary cleanups related to this procedure.

The District's Field Operations Manager should be notified 2 weeks prior to mulch installation to assure that proper trenching occurs to assure mulch does not spill over into walkways, paths, hardscapes, etc.

The contractor agrees to provide neat and defined lines along the edges of all mulched areas. This is done to facilitate mechanical edging of these areas. Additionally, Contractor shall properly trench all bedlines adjacent to concrete surfaces. Trenches shall be 3" deep and beveled. Mulched beds on slopes adjacent to turf shall also be trenched to a depth of 3" & beveled to reduce mulch washout. Mulch shall not be piled around tree trunks or bases of plants. Any mulch "volcanoes" around tree trunks shall be corrected immediately at no additional cost to District.

Contractor agrees to ensure that mulch caught in plant material will be shaken or blown from plants, so that upon completion there is no plant material left covered with mulch.

If, after installation is complete and it is determined that additional mulch or Pine Straw is required to attain the required 3" depth, sufficient mulch shall be supplied by Contractor at no additional cost to District.

At the Amenity Facility, including but not limited to the pool area, the Contractor must REMOVE old mulch and replace it with new mulch up to the 3" depth. Supplementation elsewhere is permissible.

This item will not be included in the contract amount and shall be invoiced separately the month after service is rendered. The contractor shall provide a price per cubic yard and estimated quantities to be installed per top dressing (based on his own field measurements) and shall submit with bid.

The District reserves the right to subcontract out all mulching events.

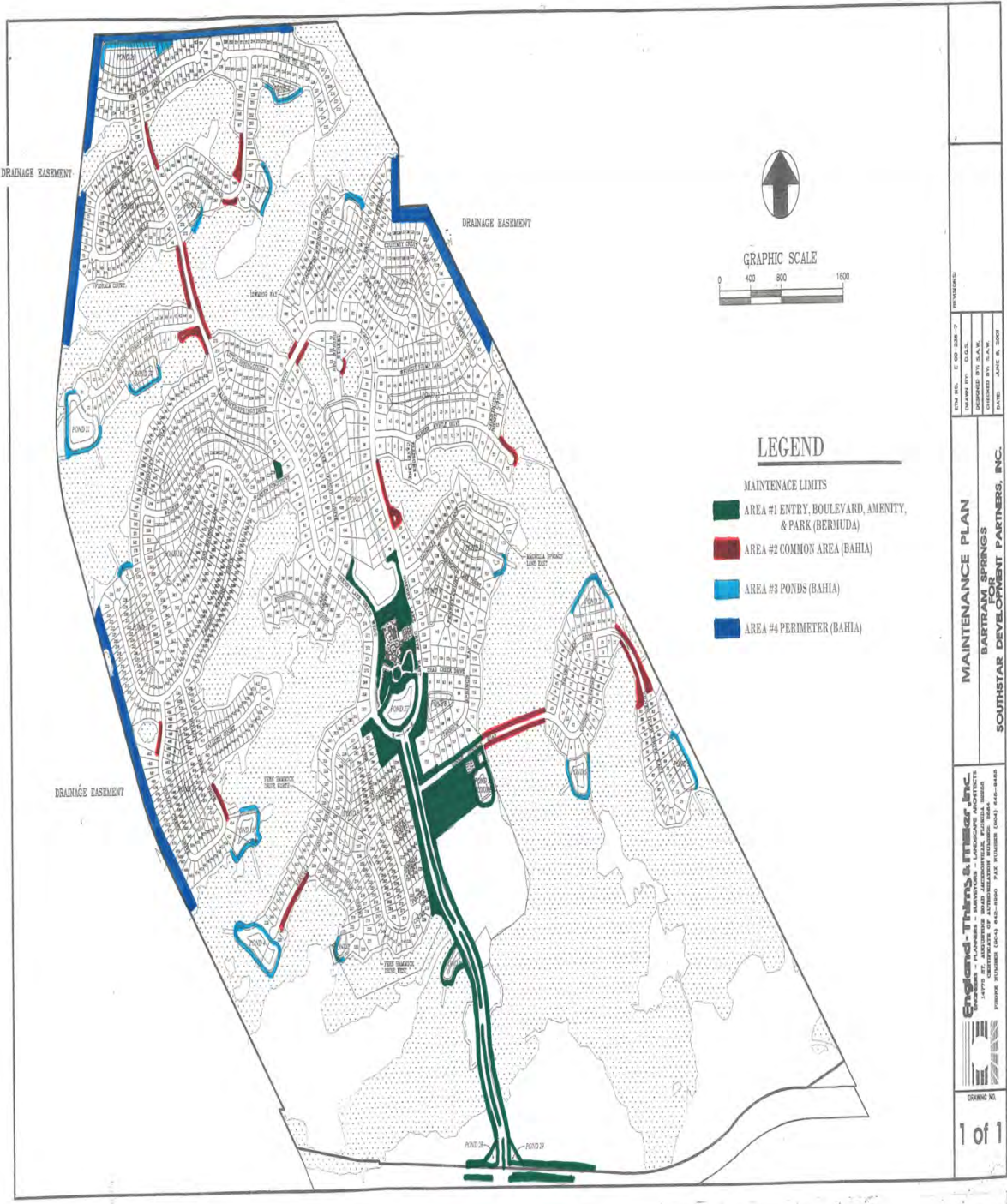
PART 6 **ADDITIONAL REQUIREMENTS**

QUALITY CONTROL INSPECTIONS - A qualified representative from the Contractor's firm shall accompany the district representative on monthly quality inspections. Any deficiencies within the scope of service shall be corrected with 7 days of each inspection.

REPORTING - A written report shall be completed and submitted 10 days prior to the monthly CDD Board of Supervisors meeting outlining the anticipated work schedule for the following month. This report shall indicate fertilization and pest control schedules, irrigation run schedules as well as special projects needing attention.

ATTENDANCE AT MEETINGS - Upon request of the District, the Contractor shall attend regularly scheduled District meetings.

LICENSURE - Contractor must have and maintain the appropriate licensure for business operation within St. Johns and Duval County and the State of Florida. This includes irrigation licensing, pest control business license and applicable business license.



PROPOSAL FOR PROPERTY MANAGEMENT SERVICES

Bartram Springs
Community Development District

A stone wall with a central plaque containing the text "BARTRAM SPRINGS" in gold lettering. The wall is surrounded by lush green trees and yellow flowers.

BARTRAM SPRINGS



Vesta Property Services, Inc.
245 Riverside Ave. #300, Jacksonville, Florida 32202
877-988-3782



FLORIDA CDDs' PROPERTY MANAGEMENT SPECIALIST
A 30-YEAR TRACK RECORD WORTHY OF YOUR TRUST

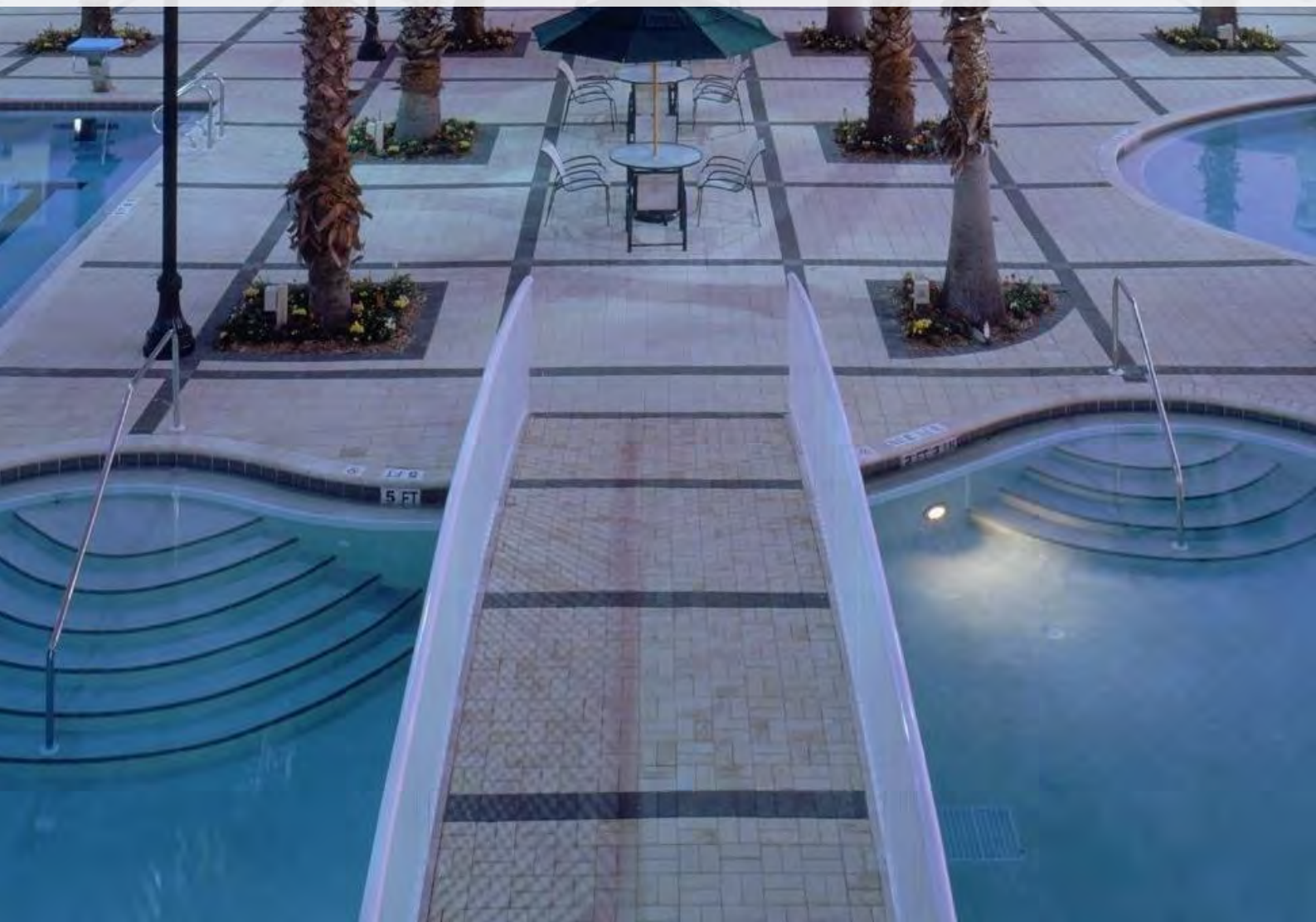


TABLE OF CONTENTS

Cover Letter	4	Scope of Services	32
Statements of Interest and Qualifications	5	<u>RFP Forms</u>	
Our Local Story	7	• <i>General Proposer Info.</i>	39
Org. Chart	8	• <i>Experience</i>	44
Support Teams	10	• <i>Staffing Model</i>	53
Lifestyle/Resident Engagement	15	• <i>Pricing</i>	54
Quality Assurance	18	• <i>Event Budget/Program Revenue</i>	60
		• <i>Insurance</i>	63



January 17, 2024

Dear Bartram Springs CDD Board of Supervisors,

Vesta is grateful for the opportunity to present this proposal for the management of Bartram Spring's amenities, infrastructure, common areas, and lifestyle activities. For about 20 years we have been a part of this community and have, through service and dedication to the District and its residents, acquired a deep and thorough knowledge of the scope and history of the District's Operations and Maintenance. Through this knowledge and experience and with new and evolving standards of practice that we will present to you, we can provide the most efficient and effective service to the community. Vesta has grown through its service to Bartram Springs and our relationship to its residents has ennobled our concept of service. We are proud to present to you our proposal to meet the District's current and future needs to continue our seasoned and successful partnership.

We have included in our enclosed information:

- Our Statement of Interest and Qualifications, which illustrates the framework that will continue to support your community.
- An update on our staffing model, based on the personal interest and development of some key staff members.
- Our recommended approach for moving forward.
- A summary overview and key milestones in our company's 30-year history.
- Comprehensive Bios for our multi-dimensional support Team.
- An extensive list of clients to whom we deliver similar property management services. Some amenity clients date back as far as 1993 and many others have joined Vesta within the last year.
- Examples of creative lifestyle offerings that we have provided to Bartram Springs.
- Detailed information on Vesta's approach to Quality Assurance.

We look forward to discussing how Vesta can best meet your needs, in hopes of continuing our long-term and successful partnership with the District. Thank you again for this opportunity and your consideration of Vesta Property Services, Inc.

Sincerely,



Jay King
Regional Vice President
Vesta Property Services, Inc.
245 Riverside Ave. #300
Jacksonville, Florida 32202



STATEMENT OF INTEREST; WHY VESTA IS BEST-QUALIFIED TO FULFILL THE DISTRICT'S SCOPE-OF-SERVICES

Vesta Property Services provides a comprehensive and multi-faceted framework of support personnel who work together to serve the Bartram Springs CDD community, including:

- **OUR ONSITE MANAGEMENT TEAM.** We provide a dedicated and experienced Onsite Management Team at Bartram Springs, consisting of a General Manager, a Field Operations Manager and an Amenity and Lifestyle Manager. Sue, Winslow and Stephanie have established themselves at Bartram Springs as professional, highly engaged, and caring individuals who work very well together on behalf of the Board of Supervisors and the residents of Bartram Springs. And, due to Vesta's strong retention and high employee satisfaction, Sue has also had the opportunity to collaborate with her predecessor John Lucansky as needed, enabling her to access well over a decade of community history.
- **OUR REGIONAL OPERATIONS MANAGEMENT TEAM.** Vesta provides a dedicated and experienced Regional Operations Management Team for Bartram Springs that includes seasoned and knowledgeable personnel in the areas of Amenity Management, Field Operations, Lifestyle programming, Human Resources, Information Technology, and Legal and Accounting support. Due to our widespread footprint in Northeast Florida, Vesta can amplify our support for the frontline team at Bartram Springs by tapping into the experience and best practices from General Managers and Amenity Managers at properties of similar size and scope in NE Florida, such as Durbin Crossing, Heritage Landing, Julington Creek, Rivertown, and Palencia. We bring at least one member of the regional team to attend your Board meetings to understand your community's needs and efficiently support the onsite team at Bartram Springs.
- **FLEXIBILITY AND RESPONSIVENESS.** With a wealth of experience and expertise throughout our company, we are able to provide exceptional responsiveness and extraordinary flexibility not only in dealing with day-to-day responsibilities, but in meeting a wide array of unexpected challenges that can occur in large communities like Bartram Springs. We were able to respond decisively to the pandemic, vandalism and restitution, security investigations, and major storm preparations and recovery because of our shared best practices throughout the region. When you hire Vesta at Bartram Springs, you receive the knowledge and experience of our staff throughout NE Florida, with a shared knowledge base that makes us more versatile and able to tailor and evolve our approach to meet the needs of evolving Boards and District priorities.
- **COMPETITIVE, EQUITABLE AND TRANSPARENT PRICING.** Our pricing models balance our desire to provide a best-in-class level of service for Bartram Springs along with the Board's and residents' desire for as much cost-effectiveness and efficiency for the District as possible. To this end, Vesta's senior management will continue to go to great lengths to provide as much collaboration and transparency with the Board as possible as reflected in our alternate approach to the RFP.
- **EXTENSIVE LOCAL RESOURCES.** We serve 17 other CDD communities within a 30-minute drive of Bartram Springs (or a total of 68 communities when you include the HOAs and POAs we serve in the area). This provides a substantial pool of talent in which to share best practices and fill vacancies when the need for additional support arises.

Vesta has strong employee retention and high employee satisfaction, in part because we invest in the development and personal interests of our associates.

- **WINSLOW WHEELER, FIELD OPERATIONS.** About a year ago, Winslow expressed interest in opportunities within our maintenance subsidiary. We always encourage our team members to bring forward their interests whether they be internal or external so we can best plan for the benefit of everyone, and we pride ourselves on getting team members where they want to go with their careers, while keeping transitions seamless for our customers. An opportunity for Winslow to make a transition became available just before the holidays. During the RFP process, we have been working behind the scenes on a transition plan to allow Winslow the professional growth he seeks, with the least significant impact to resident experience and facility and project maintenance at Bartram Springs.
- **SUE OLEAR, GENERAL MANAGER.** During this period, we have expanded Sue's scope, giving her a stronger presence in Field Operations project management and Board reporting. Sue's individual strengths and Winslow's direct training have helped us prepare for this move.
- **STEPHANIE TAYLOR, AMENITY MANAGER.** Your Amenity Manager has also been able to expand her role at Bartram Springs, taking on more facility management responsibilities, and having a higher visibility in Board meetings and facility reporting.

Vesta's investment in employee development allows us more than one option for local management moving forward. We have submitted two different staffing models and two different pricing models for your consideration as outlined in the following RFP Response. Our recommendation is "Option #1A Alternate Staffing Proposal w/ Cost Plus". This option reflects the staffing changes above as well as the following highlights:

- Consolidation of Field Operations Management across Sue and Stephanie.
- Increased Maintenance Technician support by adding a second full-time technician to the current model.
- Increased compensation across all positions to better attract and retain staff and pursue more experienced front desk personnel as we continue to adjust wage inflation.
- Save the CDD money below what is currently budgeted for the remainder of FY 2024.
- Increased transparency by reporting our onsite costs through our third-party payroll vendor each month and then charge a fixed multiplier to cover onsite non-labor expenses and offsite support expenses.
- Greater flexibility with increasing or decreasing scope of service as needed or tailor the experience level of the team members we employ at Bartram Springs relative to your budget.

“Hi Sue, just a quick note to share how pleased I am with our community. I've lived here for 13 years and I believe the community is the best it's ever been. My real estate team and I have sold the most amount of homes in Bartram Springs. We hear the positive feedback of prospective buyers. I feel like the neighborhood has a fresh sense of pride and community over the last few years. While I see and sell a lot of the new premier neighborhoods in St John's County; I love Bartram Springs and choose to stay. Our entrance, amenities, and facilities are excellent.

As a resident, I'm pleased and confident with our CDD and Vesta management. I feel like the level of community engagement, activities, and upkeep are the best I've seen in 13 years. It's easy for keyboard warriors to complain about anything and everything on Facebook, but that's the world we live in. The large majority like myself are very pleased. Great job to the CDD and your team at Vesta. You are a part of our community. Thank you for everyone's efforts!

Josh Rogers, Bartram Springs CDD Resident

”

OUR LOCAL STORY: COMPANY OVERVIEW

1992



| FOUNDER-PIONEER

Founded in Jacksonville, Florida, Frank Surface's trailblazing vision launches our company: to be a single source for (1) affordable and flexible financing, (2) expert community management services, and (3) creative and thriving lifestyle services - all under one umbrella, consistently improving and growing, and propelled by a best-in-class Senior Leadership Team.

1993



| KEY CLIENT-COMMUNITIES

7,200-unit *Kings Point Golf & Country Club* in Delray Beach is our very first client - our three-fold vision comes to life! Later, 5,600-unit *Kings Point Sun City Center* is added (in 2008.) We continue to proudly provide a wide-range of management-and-lifestyle services for our two flagship communities to this day.

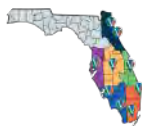
2011



| AMENITIES LEADERSHIP

Vesta acquires Florida's leading, statewide provider of amenities management services - *Amenity Services Group, Inc.* - specializing in serving the vital operations, maintenance, and lifestyle needs of Community Development Districts since 1997.

Present



| SPECIAL DISTRICT SERVICES / STATEWIDE OFFICES

Vesta realizes our vision as a leading, full-service, expert community management company by acquiring *DPFG Management & Consulting, LLC* - a specialist in district management and financing services - in 2020. Vesta has 12 offices throughout Florida, manages over 650 communities and special districts, and employs 1,200 associates for our clientele.



VESTA ORGANIZATIONAL CHART



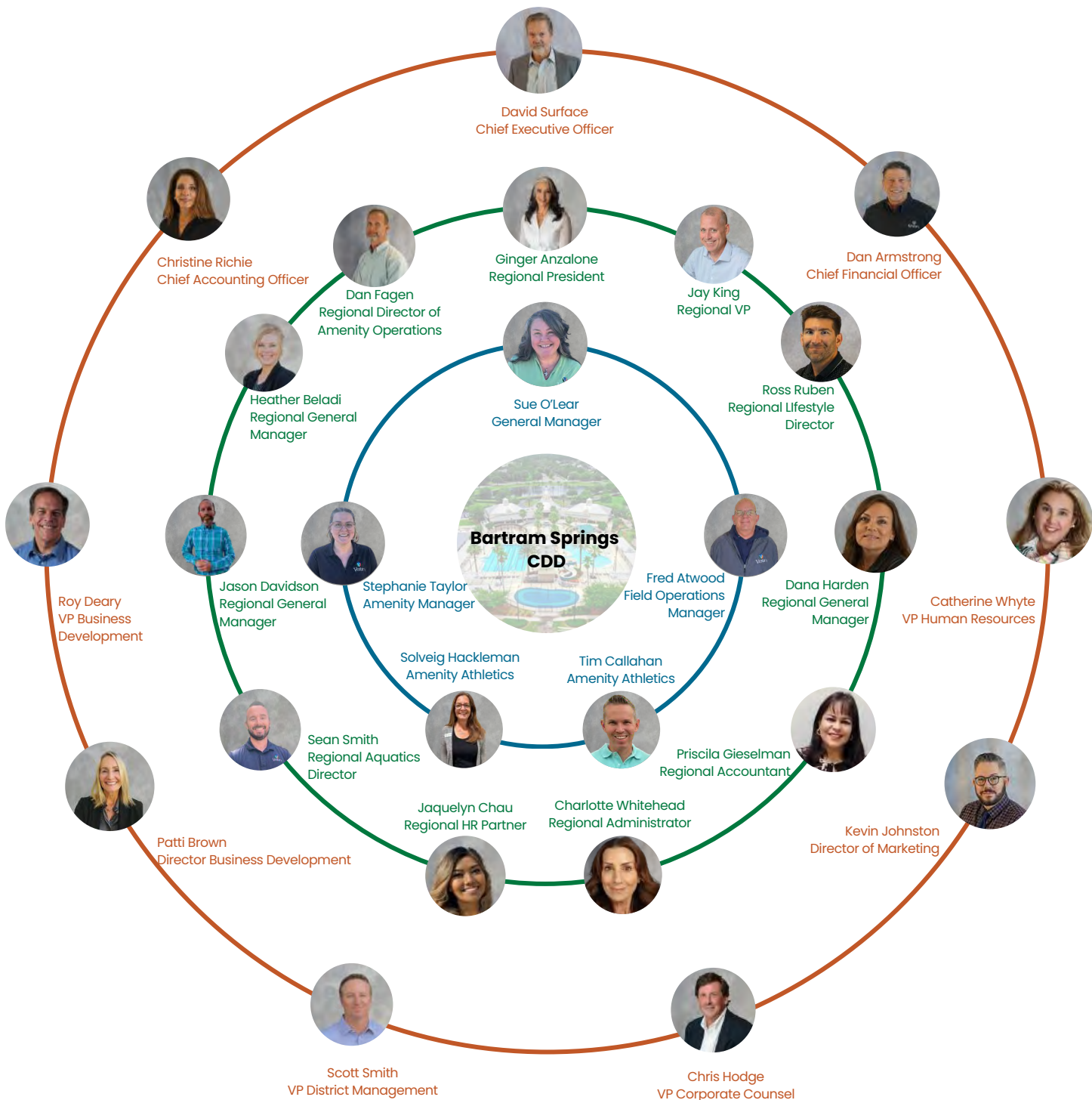
Corporate Support Team



Regional Support Team



Bartram Team





“ I had quite an extensive library of high quality educational, classic, and a wide range of story books. After my children and grandchildren progressed beyond them, I wanted others to benefit from the collection. Considering the library was ten miles away, I had hoped that to make them available for our Bartram Springs community to foster reading.

I attended the meeting to present the idea and was so excited how readily the idea was received. Everyone worked together immediately to create an environment for the 'take a book, leave a book' children's library. The staff deserves credit for not only accepting this undertaking, but also instituting it and maintaining the library for the benefit of the community.

On a personal note, while training a service dog for K9 for Warriors, Sue allowed me to use the area on Monday mornings when it was closed. This was an environment that presented challenges that the dog would have to master.

I have lived here since 2015 but my daughter lived here for 13 years. I have watched everything at the amenity center grow. I have never been more impressed now with everything that is offered and presented for all age levels to meet the needs of the community. The warmth, professionalism, and proficiency should be commended! Always on point!

Margie Boris, Bartram Springs CDD Resident

”



Bartram Springs Support Team



Local Regional Support Team

When you hire Vesta, you hire a team that is far greater than just the personnel that you have on site. Our entire Regional Team lives in NE Florida and is constantly in motion in and around Bartram Springs, providing personal assistance to our 65 client-communities (including 19 CDDs) and 400+ team members we deploy in your local area. Furthermore:

- You will have at least one Regional Team Member (and others as issues/topics warrant) attend *all* of your CDD meetings to support our onsite team, and to be a "benchmarking resource" for the CDD Board, District Staff, and your discussions and decision-making.
- Bartram Springs CDD will receive Specialized Expertise-and-Support in Amenity Operations; Lifestyle Services; Field Operations and Maintenance; Janitorial Services; Aquatics Staffing and Programming; Quality Assurance; Accounting; Human Resources; IT; Administration; Food & Beverage Operations; and Community Management that can be onsite at Bartram Springs within hours, as needed.
- With Vesta's corporate headquarters and senior leadership here in Jacksonville, you'll have further access to a variety of additional resources and industry-related, specialized expertise.

BARTRAM SPRINGS MANAGEMENT

Sue O'Lear

General Manager



Sue has 20 years experience leading teams in various industries, including food and beverage operations and fitness center management. She owned and operated her own boutique fitness studio in North Carolina for 5 years before relocating her family to Florida to be closer to her parents and her favorite beach in the world. She has been with Vesta Property Services since 2019, where she had the unique experience of navigating Amenity and F&B operations at Grand Haven during the early days of the pandemic. Sue has been the General Manager at Bartram Springs since late 2020, and has really enjoyed the year-round activity of this active and engaged community.

Sue is a devoted mom, wife, youth basketball coach, dog lover, and University of Michigan fan.

Stephanie Taylor

Amenity Manager



Stephanie comes to us with over 7 years experience in event coordination and customer service. She joined Vesta in 2021 after 5 years with St. Johns Parks and Recreation. She discovered her passion for events and kids programs while participating in the well-known mentorship organization Big Brothers, Big Sisters. She is responsible for the redesign of our summer camp program, and creation of the much-loved Letters from Santa event.

In her free time, Stephanie likes spending time with her sweet dog Momo and her kitten Bean, hiking, traveling, and going to concerts.

Fred Atwood

Field Operations Manager



Fred is the newest member of the Bartram team, but has an extensive background in operations, warehouse, and installation management. He joined Vesta in the fall of 2023 and came to Bartram Springs in January.

When he's not at work, Fred serves on the board of Flagler United, a non-profit AAU travel basketball organization based in Flagler County. He enjoys time with his family, running his smoker resulting in many delicious meals, and can also be found in search of a great taco.

BARTRAM SPRINGS SUPPORT TEAM

Jay King

Regional Vice President/Regional Manager for Bartram Springs CDD

Jay has more than 30 years' experience in management across varied private and public sectors. Jay joined Vesta in 2017. Jay and his wife Laura, who is a teacher at Bartram Springs Elementary, have raised their family in Bartram Springs since 2007. Jay served on the CDD Board for 8 years, coached Amenity soccer for 5 years and was the School Advisory Council Chair at Both BSE and TLAM for a combined 7 years. He is a Navy Veteran and a cancer survivor.

Jay is responsible for supporting our Northeast Zone which is comprised of 70+ communities, where our 450+ team members provide a variety of services such as community management, amenity management, lifestyle, aquatics, food and beverage, field operations, maintenance, and janitorial services. Jay enjoys family, church, traveling, swimming, kayaking, biking and downhill skiing.

Ross Ruben

Regional Lifestyle Director

Ross has 20 years of events, programming and entertainment experience with MTV Networks, Universal Studios, Sea World Orlando and multiple top-ranked entertainment and event companies on the East coast.

Ross joined Vesta in 2016 after serving as Julington Creek Plantation's Lifestyle Director for one year and was promoted to a Regional position at the end of 2017. He continues to develop and oversee the programming, events and marketing internally and is an integral part in increasing the quality of all of our Northeast Florida client-communities year after year.

Sean Smith

Regional Aquatics Director

Sean is the Regional Aquatics Director for the North Florida area. He has more than 17 years experience in the Aquatics Industry, working with several Premier Communities in the region. He joined Vesta in 2013. Sean is responsible for the development and implementation of Aquatics Programming across all our properties, including Lifeguarding Certification, CPR/AED/First-Aid Training, and Swim Instruction. Sean manages over 200 lifeguards in peak season.

Sean is committed to bringing the highest level of service and training for all Aquatics Personnel for Vesta. With his specialization in being outdoors, Sean loves to hike, surf and bike, and also loves being a vested part of every community he serves.

BARTRAM SPRINGS SUPPORT TEAM

Solveig Hackleman

Head of Administration, Amenity Athletics



Solveig Hackleman moved to St Augustine from Colorado in 2008. She immediately signed her children up for soccer once she learned there was a league right in her own neighborhood! Her kids enjoyed it so much that they played every season and flag football also. Solveig's daughter enjoyed flag football every bit as much as soccer!

After meeting so many wonderful neighbors and making many friends, she began working at Heritage Landing Amenity Center. Soon after, Solveig began working as the Head Administrator for Amenity Athletics in 2010. "It has been a pleasure to watch the program grow in North Florida. I work mostly behind the scenes doing administrative work, but my favorite part is seeing the joy that Amenity Athletics brings to so many families. I love being a part of something that affects so many people in a positive way!"

Tim Callahan

League Director, Amenity Athletics



Tim Callahan is the League Director for Vesta's in-house athletic league Amenity Athletics. Tim has always had a passion for sports and coaching. As a 3-sport athlete in high school, Tim went on to play college soccer (Southeastern) & college basketball (Trinity College). After college Tim began his coaching career at Providence School in Jacksonville where he coached three different sports over a 9-year period.

Priscila Gieselman

Regional Accountant



Priscila has 12 years of property management experience in the Jacksonville area and 15 years of accounting experience. She has owned and managed properties, and communicates with board members. She joined Vesta in April 2017 and supported one of our major accounts, Julington Creek Plantation CDD.

Priscila also prepares and files sales tax reports with the Florida Department of Revenue every month. She makes sure all café licenses and certificates are current. Her duties also include vendor applications, client invoices, payroll, P&L and end-of-month reconciliations. She supports our frontline managers in NE Florida by promptly addressing any questions or concerns they have. In her free time Priscila enjoys biking and traveling.



“ I'd like to take the opportunity to share some of my family's thoughts on the work that the Vesta team is doing in our neighborhood, Bartram Springs. We moved here in 2018 with a toddler and another on the way. We fell in love with the neighborhood but were unaware of the sense of community we would find here. We absolutely attribute this to the Vesta team and the programs and services they provide for us. Our daughter has participated in the Bartram Springs Summer Camp and Kids Activity Night for the past two years and we'd been counting down the days until our son turned five. He got to join his very first Kids Activity Night in November! This is a HUGE luxury and convenience for us to have right here in our own neighborhood. These are just two examples that don't even begin to touch on the wide variety of opportunities available to us to meet others in our community and create memories with our family. We are regulars at Food Truck Fridays, I've participated in multiple fitness classes, pool parties, festivals, Easter egg hunts, Santa visits (and personalized letters from the big guy!), soccer and swimming and the list goes on and on.

While we have been very pleased with the stellar work that Vesta is doing, we also recognize the time and energy it takes to make all of this work. The team running the show here is always responsive and helpful and truly takes all voices into consideration. This is true dedication to our community and we wholeheartedly believe that Vesta will continue to be the best choice for Bartram Springs.

”

Lauren and John Wilkinson, Bartram Springs CDD Residents





30 Events and Activities planned for the 2023/2024 Fiscal Year including:

- Kids Triathlon and 5Ks
- Movies on the Lawn
- Fall Festival
- Trunk or Treat
- Ornament Decorating
- Kids Activity Nights
- Letters to Santa
- Sundaes with Santa
- Tennis and Pickleball Socials
- Penguin Plunge
- Spring Fling
- Community Garage Sales
- Mother's Day Celebration
- Memorial Weekend Kick-Off
- Father's Day Celebration
- 4th of July Celebration
- Labor Day Celebration

2 Highly Successful In-House Programs: Amenity Athletics and Summer Camp

Amenity Athletics

- Over 10 years of existence in the community
- Grew from 3 seasons per year to 6 per year as of 2023
- Over \$35,000.00 in shared revenue
- Employed more than 30 residents in season positions as referees

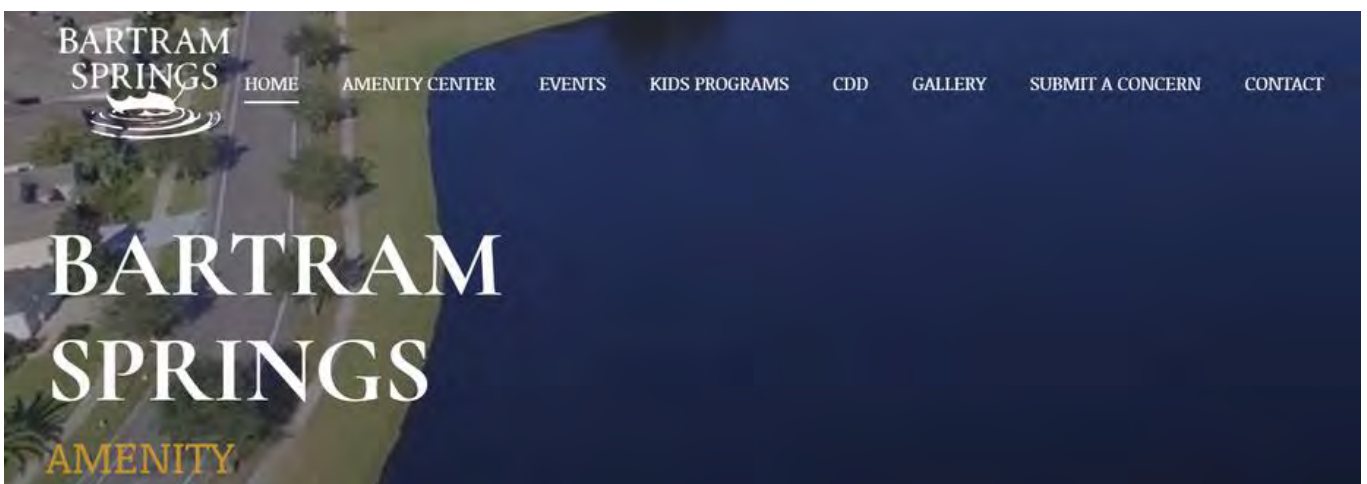
Summer Camp

- 40 to 50 kids per week - Sold out prior to camp starting
- Over \$40,000.00 in shared revenue
- Convenient online registration and payment system



In-House Developed and Managed Website and App

- Hosted and created, contemporary, mobile- and user-friendly website BartramSpringsAmenity.com.





Resident Engagement and Lifestyle Marketing in the Community

- Comprehensive, creative and high-quality lifestyle newsletters, flyers, e-blasts, and other forms of resident engagement.
- Our teams are trained to take photos and video at community events and programs to share our real-time resident engagement.





FROM THE GENERAL MANAGER



BARTRAM FAMILIES

As we move into 2024, you will see staff making preparations for another jam-packed, fun-filled spring and summer season! We have several projects in motion to make sure your Amenity Center is ready to welcome you back for Spring Break!

Along with that, we hope you enjoy the new look that Jayne has been working on for our 2024 Bartram Bulletin! I look forward to filling the pages with stories and information that are important to all of you.

Here's to a happy, healthy, prosperous new year for all who live in the Bartram Springs community!

Thank you,
Sue O'Leary
General Manager

Calendar of Events

FEBRUARY 2024

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					Event: [illegible]	Event: [illegible]
	Event: [illegible]		Event: [illegible]		Event: [illegible]	Event: [illegible]
	Event: [illegible]		Event: [illegible]		Event: [illegible]	Event: [illegible]
	Event: [illegible]		Event: [illegible]		Event: [illegible]	Event: [illegible]
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	Event: [illegible]		Event: [illegible]		Event: [illegible]	Event: [illegible]

[Click Here to Visit Bartram Springs Amenities Interactive Calendar to get more information on upcoming events, and food truck menus.](#)

For the Kids

BARTRAM SPRINGS

2024 KIDS SUMMER CAMP

\$230 weekly

Online Registration NOW OPEN

JUNE 10 - AUGUST 9

BARTRAM SPRINGS AMENITY CENTER

CONTACT US
+123-456-7890
hello@vestaproperties.com

Fun Activity Programs
Outdoor Games, STEM activities, Daily Pool & Playground time (weather permitting), Weekly Themed Crafts, Afternoon Movie, and Special Guests.

Advertisers

BARTRAM SPRINGS NEWS

DEAR BARTRAM SPRINGS COMMUNITY

All L.L. Voyagers Academy are excited to announce that we are now enrolling at both of our wonderful locations, The Doctors Village and Franklins.

WHY CHOOSE LVA?

- Opened Learning Classrooms
- Outdoor Learning and Play Environments
- Creative Social Experiences
- Safe, Secure and Uninterrupted Learning
- Additional Areas for use in open or indoor settings
- A more holistic educational experience

LIMITED TIME OFFER
For Bartram Springs Residents ONLY

Now, Discount or Registration to welcome you especially into the Bartram Springs community, we are delighted to offer an exclusive 50% discount on registration fees for all Bartram Springs residents who enroll their children in the month of November and December 2023.

How to Claim Your Discount!
Show proof of residence to our enrollment specialist.

This is a limited-time offer, so act fast! Don't miss this opportunity to give your child the gift of an unforgettable educational experience.

Thank you for being a valued member of the Bartram Springs Community. We look forward to welcoming your family to L.L. Voyagers Academy.

Contact us at (232) 267-9500

Click Here to Learn More About Our Business Advertisement Program

Amenity Hours, CDD Meeting, & Reservation Links

Hours

*Subject to change

Clubhouse Office

- Monday: Closed
- Tuesday - Sunday: 9:00 AM - 7:00 PM

Pools & Splash Pad

- Monday: Closed
- Tuesday - Sunday: Dawn - 9:00 PM

Waterslide

- Closed for season.

Basketball Courts & Playgrounds

- Dawn to Dusk

Athletic Fields & Bark Park

- Dawn to Dusk

Fitness Center

- 4:00 AM - 11:00 PM

Tennis & Pickleball Courts

- Dawn to 11:00 PM
- Reservation Time Slots begin at 8:00 AM

Firepit

- 9:00am-11:00pm (staff permitting)

Volleyball Court

- Dawn to Dusk

Fishing Dock

- Dawn to Dusk

Reservation Links

- Lap Lanes
- Special Events
- Tennis
- Tennis/Pickleball
- Volleyball
- New Resident

BARTRAM SPRINGS CDD Meeting
February 12, 2024
8:30 am
in the Social Hall

www.bartramspringscdd.com

RESOURCES AND OTHER SUPPORT FOR VESTA'S PROPERTY MANAGERS



- Regional Lifestyle Director, with 20+ years of experience in events, entertainment and programming for multiple, high-quality companies and communities.
- Vesta's 50-page Lifestyle Handbook used for training and reference.
- Hands-on help with staff turnover/transitions and Managers' use of PTO benefits.
- Preferred Vendors List, enabling some of the best pricing in the industry.
- Quarterly Lifestyle Newsletter provided to the entire state, featuring new vendors, new ideas, and more for all Vesta Amenity Managers.
- Monthly Training sessions; Quarterly Idea-Sharing sessions with all Managers.
- Shared Expertise: Oversee 12 Community Events Budgets (\$9,000-\$75,000/yr.)

Vesta's Approach to Quality Assurance

Our local Regional Support Team, in partnership with our onsite teams, Boards, and other stakeholders, have developed scalable and customizable Best Practices tailored to each account and scope-of-service, to ensure an optimal experience for our residents. Our approach has and continues to evolve with feedback, advances in technology, and further experience.

Vesta's approach, while varied in application, is designed to eliminate issues before they occur - or at least quickly and efficiently address them as they are identified - to provide the best possible experience for all stakeholders.

NOTE: These 8 components of Vesta's approach to Quality Assurance are explained further on the following pages.





Initial Operational Analysis

For new accounts, our regional team will develop an operational analysis plan and timeline (who, what and when) within the first 45 days of starting the contract, to share with the Board prior to implementation. This approach will allow time for familiarization and review of current operations, engagement with all stakeholders, and finally recommendations to "optimize" the overall resident experience, daily operations, and opportunities for financial efficiencies.

JCPCDD Example

The most relevant example of this same type of in-depth analysis for Palencia is our undertaking at Julington Creek Plantation CDD, which at the time we began our operations there was already a 20+-year-old community of nearly 5,900 homes, and largely staffed by CDD-employed associates. Over the course of our first 6 months, Vesta conducted an "Optimization Study," resulting in a detailed, 20-page analysis of all aspects of the amenity/recreation operation along with recommendations.

The implementation of our recommendations resulted in:

- *A savings to the CDD of 23% or \$373,000 annually in 2022 dollars (using a general ledger, line-by-line comparison with the year before we started).*
- *While simultaneously improving stakeholders' (Residents, Board, District Staff, and Vesta onsite team members) satisfaction with our operation.*

(Yes, "the best of both worlds!")

Review, Analysis & Recommendations Regarding Operations at JCP

Introduction:

As committed, Vesta has conducted an in-depth review and analysis of the operation of Julington Creek Plantation's Recreation Amenities. As we and others have referred to it, our intent has been to determine how to "optimize" a match between the District's needs and resources, addressing such topics as department leadership, structure, programs, and finances. Our recommendations largely look at the next 18 months, through the end of the District's next fiscal year. With the benefit of an additional 12 months (beyond just our first 6 months to date), it is likely that additional changes to further optimize things will be submitted by Vesta in the coming year or so. However, as of now we are trying to strike a balance that:

- (1) Maintains a degree of stability through a continuation of proven and successful approaches and people at JCP (and minimizes negative disruption in level of service, staff morale, etc.);
- (2) Considers input from others with helpful insights and/or long-term histories with JCP;
- (3) Taps into our experience elsewhere to bring a new perspective and ideas to the operation;
- (4) Results in completing a thorough and detailed review and necessary recommendations, in conjunction with the timing of the District's current FY '18 budget process.

Objectives of Vesta's Optimization Report:

To guide this process, aided by the helpful input of the Board and District Management, the specific objectives of this Report have been:

- (1) Challenge the status quo and the notion of, "Because that's how we've always done it."
- (2) Align current operating revenues and expenses by department to improve clarity of understanding.
- (3) Achieve Personnel "Optimization" by:
 - a. Ensuring an understanding of key staff's roles, responsibilities, and individual strengths.
 - b. While being as considerate of our team members as possible, make recommended improvements to the overall operating structure.
- (4) Identify potential cost-reductions in the Recreation Operation to benefit the District (such as redirecting resources to other areas, reducing assessments, etc.)
- (5) Achieve Programs "Optimization" by:
 - a. Answering the question of, "What is an 'amenity' and what is a 'program'?" by department and activity.
 - b. Recommending the best overall approach to handling Programs (i.e., continuing it as a District-subsidized operation or moving to a contracted/outsourced operation.)
- (6) If possible, incorporate some of the Board's recently-stated top priorities:
 - a. Landscaping Improvements along Racetrack Road.
 - b. Energy Efficient Property Upgrades



Board Reporting And Engagement

We keep track of **Action Items from your CDD meetings**, confirm we have them correctly captured within 48 hrs. of the meeting via email, and then provide to all board members and staff. We then provide updates until completion of each item to ensure nothing is dropped and expectations are managed accordingly.

Bartram Springs Post Meeting Action Items		
Date: 3-13-23		
Item	Owner	Description
Amenity Athletics	DF/SO	Identify # of non-residents playing on BS Teams. Create additional fee for non-residents of which 100% will be paid to the district. Create projections of additional revenue share of 10% for ALL participants using Bartram fields.
Pool Chemicals	WW	Shop it ONGOING
Office Supplies	SO	provide an accurate projected expense for FY'24
Special Events	SO	provide an accurate projected expense for FY'24
Holiday Decorations	SO	provide an accurate projected expense for FY'24
Ibis Invoicing	WW	Identify total amount paid. Follow up with board asap. Execute peer review for future large scopes of work-COMPLETED email sent to Mrs. Reynolds
Internet/ Cable Provider	WW	Shop services ONGOING
Field Monitoring	SO/ST	Focus on field camera at school dismissal
Incident Reporting	SO	Meet with Board Chair ahead of next meeting to review
Leak Detectors Invoice	WW	completed sent email to Mrs. Reynolds.

Our onsite management team will provide **weekly board updates** via email on any items of interest to ensure the whole Board is kept up to speed efficiently.

Weekly Board Reporting Includes:

- Recap of significant operational events
- Highlight upcoming events and recaps of previous events
- Status of projects and ongoing maintenance items
- Update on Board Action Items

PLEASE DO NOT REPLY ALL



Good afternoon, everyone –

I just wanted to take a moment to reach out and update everyone on a few things since we were all together last week.

First, with over 125 families braving the wind and the rain yesterday, we had another great day with Santa Claus! I worked in the front office for part of the day, talking with residents on their way in and their way out. I personally received a lot of positive feedback on the quality of our Santa, and how great it is that kids aren't rushed through their visit with him. I am also thrilled to say that we were able to accommodate not only all the families who made reservations, but also the five or so that called or came up without a reservation as well. It was a fun day to be a part of once again, and being that it is the last event of 2023, Stephanie can now take a breath, enjoy her "weekend", spend some time with her sweet dog and precocious cat, and rest up a bit. She will be back in the office Wednesday but will be taking some personal time from December 29 – January 2.

Second, Winslow sent out a very comprehensive update on the projects he worked on last week. Item updates included:

- **Fitness Center Air Conditioner Repair – COMPLETE.** The discovery was made that the air conditioning units currently installed are actually residential units, not the type of commercial unit designed for cooling a fitness center. Winslow is continuing to research this issue to see what, if anything, is possible in terms of keeping the gym cool without being subject to another expensive coil replacement in a few years due to the output required from those units.
- **Slide Tower Bolts – COMPLETE.** The bolts have been changed, and Winslow will follow up on any necessary documentation for the engineer.
- **Bollard Reconfiguration – ONGOING.** Major debris has been removed, bollards rearranged, and electrical work has begun. Winslow is receiving daily photos/updates from the site supervisor, and Supervisor Nierengarten has been closely involved with oversight of the project as well.
- **Fountain Repair – ONGOING.** Lake Doctors found that there was a broken casing on the motor. The repair will be covered by the warranty, and at this point we are expecting the work to be completed by the end of the week.
- **Roof Replacement – ONGOING.** Our vendor is obtaining some actual pieces of the roofing material in 2 colors to perfect the color match, and they have begun their plan for staging the area. I talked with him about potential timing as not to impede upcoming private rentals or events. On his last visit, Mighty Dog pulled up some of the existing roofing material that we are replacing and only then discovered an issue with the way the existing gutters are attached to the roof. In brief, they are attached in such a way that, should we ever need to remove or replace them, it would be impossible to do so without manipulating the roof in such a way as to invalidate the warranty. Winslow is working with him to determine the best course of action to handle this, and more information to come on that process as it becomes available. We continue to work toward a mid-January start date for this project.



Vesta will also provide detailed **monthly reporting** for your CDD Meetings to ensure all stakeholders are aware of what has been accomplished and the status of ongoing work and plans, to enable CDD meetings to be as efficient as possible.

Sample page from a Monthly Amenity Operations Board Report:



General Manager's Report

Date of report: 11/6/2023

Submitted by: Sue O'Leary

LIFESTYLE – NO BOARD ACTION NEEDED

OCTOBER EVENTS RECAP: We often think of fall as a quieter time around the Amenity Center, but some of our largest, most popular events happen from October – December. Three very well-attended, popular events happened last month with the Kids Tri, Fall Fest and Trunk or Treat.

KIDS TRIATHLON: We had over 50 racers come to complete the SWIM BIKE RUN. There was a fall chill in the air, but the water in the pool was still in the upper 70s. We had a great range of participants, from seasoned Triathlons, to LOTS of Barracudas, and many doing their very first race event. The company who does the setup and provides the chip timing is experienced and fun and very easy to work with. This race continues to be one of the favorite events we do at Bartram Springs.



Swim



Bike



Run

FALL FEST: One of our largest events of the year! We started the day with Cocoa and Coffee, inviting residents to come to the Amenity Center to update their profile photos as part of the Audit. I enjoyed seeing some families come in after they were at the park for Amenity Athletics, having cocoa and a snack, and getting updated. Then after noon, event staff began arriving to assist close to 30 vendors set up their booths for the Vendor Walk. Our inflatables and face painters arrived, and Stephanie also had a pumpkin painting station for all of the kids. And one of the highlights of the event, the professional photographer! They added a bench and some more mums to our fall display, and families had the opportunity for gorgeous fall photos.



Sample page from a Monthly Field Operations Board Report:



Field Operations Manager's Report

Date of report: 11/13/2023

Submitted by Winslow Wheeler

PROPOSAL PRESENTATION - Board Action Necessary

AMENITY CENTER ROOF REPLACEMENT

POOL DECK PAVER PROJECT – STRIP, CLEAN, SEAL

PROJECT UPDATES/COMPLETIONS – No Board Action Necessary



HOLIDAY LIGHTING INSTALLATION: While we don't plan to turn on the lights until Thanksgiving weekend, they were installed on November 1st, thus giving us plenty of time to fluff branches, test lights, and add bows. Further, the new Thanksgiving signs were also placed. Stephanie and the Facilities team will complete decoration of the Social Hall Thanksgiving weekend.

NIGHT SWIM LIGHTING- Lighting was replaced 10/18/23. The installer has confirmed the scope of work did not alter the output of the light, and the Department of Health confirmed via email on 11/6/2023 that we do not need to be re-inspected, a letter from the installer about the replacement will suffice. We re-established Night Swim on 11/6.

SLIDE TOWER – Still seeking a general contractor for the replacement of the tower bolts per the Structural Integrity Review. This is an equal-to-equal replacement only. Please see attached report.

BASKETBALL COURT RESURFACING- Contract has been submitted for signature. We are still anticipating a November date for the work.

RED MAPLE TREE REMOVAL (AMENITY KIDS PARK) – Removal of the tree was temporarily postponed, will be rescheduled for November. Replacement of the tree is pending; the vendor specified that the



Resident Satisfaction

We have found that “point-of-experience” (QR) surveying is far more valuable and less intrusive than formal, periodic, emailed resident surveys. So, we place them conveniently throughout our facilities to capture feedback.

Vesta also monitors social media (Facebook, Nextdoor, etc.) when permitted to do so, and provides clarification to clear up any misperceptions (so they do not “fester” online.) Obviously, our onsite team is regularly in personal contact with residents and acting on their feedback.

QR Coded Resident Survey

- Located conveniently throughout facilities on aesthetically appropriate placards, to provide an opportunity for residents to easily provide feedback on their experience, and only when they want to do so.
- Surveys can be tailored based on location (tennis courts, events, reception area, pools, café, locker rooms, parks, etc.)
- Residents simply use their phone to complete the quick survey.
- Utilizes rating scale questions to provide benchmarking over time, as well as text boxes to provide detailed and open-ended feedback.
- If residents desire, they can be contacted directly by our team so that we can personally follow up on their experience.
- Survey links can also be placed on the app or website as desired and/or hard copies made available to suit resident-preference.
- Consistent feedback is then shared with the Board through manager reporting, along with any necessary action items.

The image shows a screenshot of a web-based survey titled "Pool Experience Survey". The survey is from "bartramspringsamenity@gmail.com" and is marked as "Not shared". It contains several questions:

- "Do you think this policy is a necessary and/or effective means to accomplish these goals? Why or why not?"
- "Please tell us a little about your household. What are the ages of the people in your home that utilize the pool?"
- "What days/times of day do you most utilize the pool?"

A QR code is overlaid on the survey, with the text "POOL EXPERIENCE survey" and "we value your feedback!" around it. The QR code is intended to be scanned by a mobile device to access the survey.



Facility Inspections

We take a couple of approaches to formal facility and infrastructure inspections in addition to those we support from District Engineer Reports and Reserve Studies.

- Our Regional Team performs periodic, customized inspections based on our scope-of-services, as needed (such as upon commencement of the contract, based on operational issues, turnover of key staff, etc.), to provide offsite accountability for Vesta's onsite team. We also want to ensure that we set everyone up for success, share best practices, and avoid "blind spots" by conducting these periodic "peer walks."

Date:		8/42021	Grading Scale Value	
Community:	RiverTown	4	Evaluation demonstrates a high level of proficiency	
Onsite Manager(s):	Clint Waugh	3	Evaluation demonstrates proficiency	
Manager Title:	Lifestyle Director	2	Evaluation demonstrates partial proficiency	
Supervisor:	Jason Davidson	1	Evaluation demonstrates minimal proficiency	
Supervisor Title:	General Manager	0	No evidence of proficiency	
		n/a	Not Applicable	
Scope of Services & Measurables		Value	Observations/Comments	
		0 through 4		
L1	Upon entering the Amenity Center			
a	Event and programming materials on display	4	Newsletters are printed out and up at both amenity centers	
b	Staff would be able to share the following			
	Website	N/A		
	Amenities available to the residents	4	Clint is very aware of everything we offer at RiverTown, helps potential home buyers by providing answers about amenities, events and programs. Staff very knowledgeable of all amenities also.	
	Whom to contact to process a new resident	4	Clint and Jason both have access to do this. Staff knows to send them to either one of them.	
	Whom to contact to acquire a rental	4	Clint takes care of all rentals proficiently (less than 1 hour	

- Managers in similar positions are paired and provided the opportunity to walk each other's properties, point out opportunities and solutions, as well as share best practices for mutual and informal benefit. They then provide a summary of what they learned, so we can ensure there is sufficient value and best-determine how to plan subsequent experiences and/or development opportunities.

Peer Site Review	
Objective: Gain a thorough understanding of day-to-day operations. Discuss items such as current contracted services, staffing, project work, vendors, trends and challenges. Most importantly share best practices and look for opportunities to learn and provide input to one another. Take notes as both the host and the visitor. Submit to your supervisor for recording purposes.	
<i>Date: 1/3/22</i>	<i>Visitor: James Robinson</i>
<i>Property: Durbin Crossing</i>	<i>Host: Ben Conner</i>
<i>Notes/ Observations/ Best Practices</i>	
Get contact info for fitness preventative maint company from Ben. Durbin was pleased with professionalism and response time of the vendor.	
Recently did a paint RFP for facility exterior. Get the template to use for upcoming RFP	
Forward contact info from our current vendor, Welches Tennis. Durbin is looking to renovate	
Consider branding tennis windscreens. Looks sharp! Research budget	
Ben recently replaced his pool pump through AI Pools. Do NOT USE. Poor workmanship with	

Team Member Audits

We also do a variety of team member audits to ensure their training sticks and to provide ongoing feedback and coaching to set us and our team up for success. The following are two examples.

Customer Service Audits

- When a leader witnesses an interaction between a resident and a team member that has opportunity to be improved or to be reinforced and celebrated, the individual is pulled aside informally at the first available moment to coach or congratulate.
- A more formal process is utilized with new team members that follows a checklist tailored to their job scope that reinforces our standards for customer service.

MiraBay Reception Standards & Evaluation

Reception		Yes	No	NA
1	Receptionist opens with a warm and sincere greeting with correct time of day. Ex: "Good morning, Mr. Jones." "Good afternoon. How was your week?"			
2	The receptionist maintains a calm and clear voice.			
3	The resident is always asked permission before being placed in hold. Ex: "May I place you on a brief hold while I contact Maintenance?"			
4	Receptionist is highly articulate and avoids slang and excessive use of phrases/fragments. Ex: Not using slang such as "yep", "uhh", "uh", "uh", "uh".			
5	Receptionist is polite and maintains a gracious tone and appropriate pace throughout the interaction. Ex: The resident does not feel rushed or overwhelmed by the information provided.			
6	Receptionist readily smiles and maintains an engaging expression.			
7	Receptionist makes eye contact and keeps focus on the resident.			
8	Receptionist exhibits a genuine sense of urgency and concern for that resident.			
9	Receptionist is thoughtful and sensitive, demonstrating anticipatory service when appropriate and helpful. Ex: Offering the keys and terms of Galley Call to new residents before they ask for it.			
10	Receptionist is knowledgeable about entire community or obtain accurate and prompt answers.			
11	Receptionist does not decline a request without offering an appropriate alternative. Ex: "I'm sorry, but I can't help you with that. I would be happy to connect you."			
12	The resident's name is stated effectively as a signal of recognition, but accurately. The number of times is determined by the length of the interaction. Ex: "Here you go, please, your name is David."			
13	Receptionist is consistently well groomed, wearing clean and well-fitted attire. Name Tag is clearly visible.			
14	Elements of communication among staff is consistent and complete; resident does not have to repeat requests at any time.			
15	Receptionist closes interaction with polite and appreciative remarks. Ex: "Thank you, Mr. Jones."			
Observer:				
Observer Signature:				

Lifeguard Audits

- Our Lifeguards are audited by their supervisors on an ongoing and random basis while they are working to ensure sustained proficiency in their lifesaving skillset. These audits included passive observations as well as active engagements to test their response times, CPR and first aid proficiency, ensure they have the required gear in their kits, the opportunity to save of an actor who pretends to be drowning, etc.





Vendor Management

We've developed tools such as our "Landscape Accountability Tool" that ties a vendor's contract to efficient evaluation criteria, to best-ensure the highest levels of service and timely, specific, and measurable feedback. We have also worked to create more competition in the marketplace by using our local economies of scale to draw in new vendors as needed.

RECDD I, II and III Landscape Deficiency Report		February		March			April								
Contracted Item Description		1/24-1/30	1/31-2/6	2/7-2/13	2/14-2/20	2/21-2/27	2/28-3/6	3/7-3/13	3/14-3/20	3/21-3/27	3/28-4/3	4/4-4/10	4/11-4/17	4/18-4/24	4/25-5/1
Annuals	Contractor shall replace approximately Two thousand four hundred (2,400) annuals in four (4) inch pots up to four (4) times per year in designated areas noted on the service area map and maintain annuals to ensure a healthy appearance. (pg 30)														
	Contractor will remove dead or dying annuals before the appearance of such annuals could be reasonably described as an eyesore. If the beds are left bare prior to the next planting, Contractor will keep such beds free of weeds at all times until the next planting rotation occurs. (pg 30)	3	4	5	4	5	3	4	4	4	3	3	4	5	3
Total Items		31	33	30	30	28	32	26	28	28	30	34	30	30	30
Total Possible Points		155	165	150	150	140	160	130	140	140	150	170	150	150	150
Total Actual Points		127	143	132	124	116	137	112	128	132	127	147	122	126	110
% of Total Possible Points		82%	87%	88%	83%	83%	86%	86%	91%	94%	85%	86%	81%	84%	73%

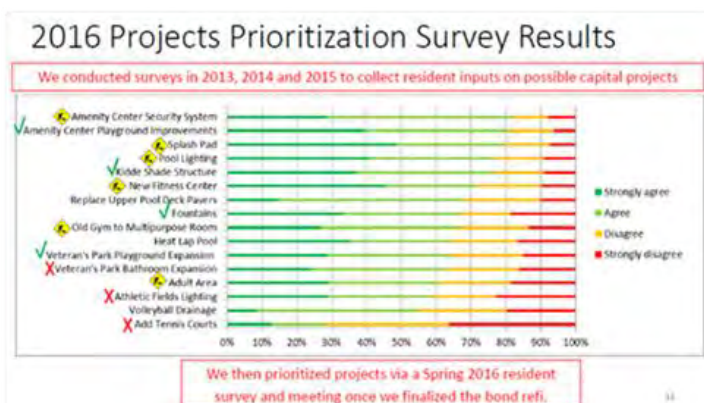
Timeliness Scoring	Pts
Completed within timeframe per contract/vendor timeframe	2
Completed but not within timeframe per contract/vendor timeframe	1
Not completed	0
Quality Scoring	
No discrepancies per contracted standard	3
Minor discrepancies per contracted standard	2
Major discrepancies per contracted standard	1
Work not performed per contracted standard	0
Maxium Points per a contracted task	5

- Based strictly on the landscape contract.
- Contracted service items are placed by week onto a calendar, based on when they are to be completed.
- Inspected and evaluated weekly, to produce an overall score % (actual pts./possible pts.)

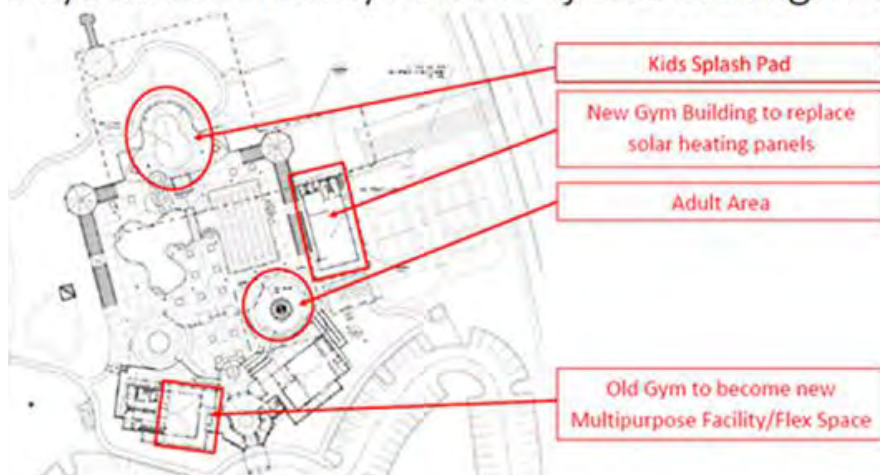


Project Management

- Vesta actively supports all aspects of projects that our client-CDDs undertake, from sourcing vendors, aiding the board in their decision-making process, and then working closely with hired vendors.
- We leverage our expertise and the vendors' while providing accountability regarding their quality of work and contracted scope of work, to best ensure that all stakeholders are engaged and kept updated on (1) work progress to-date; (2) that the work is completed on-time; and (3) that the best overall value is provided to the CDD.
- Vesta has many years of close experience with local vendors and we share our recommendations across all of our client locations. We have participated in regular capital work such as pool resurfacing, addition of pickleball courts, and complex, multi-million dollar enhancement projects. Examples are shown below.



Layout of Amenity Area Projects In Progress





Team Member Development

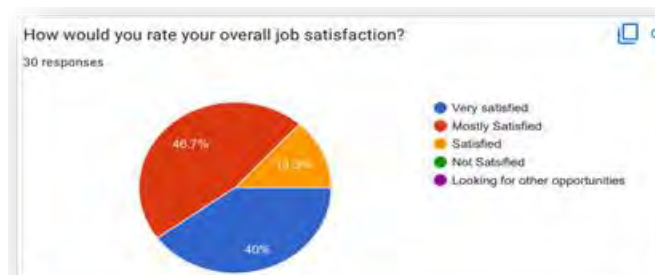
Our Team Members throughout Vesta are absolutely critical to our success in serving our customers, so it is essential that we invest in them. Our strong local presence provides our area team many opportunities for development and advancement, which helps us attract and retain the best talent.

Vesta employs customized, onsite operational training; supports our team to obtain specialized certifications; and provides Vesta-specific Customer Service Training to "set them up for success". We further build upon that with networking opportunities for managers at our pre-and-post season, all-manager meetings and through "peer walks."

- We also provide timely feedback through our **semi-annual check-ins**, which evolved from previous performance management reviews to a less formal, more frequent and empowering experience.



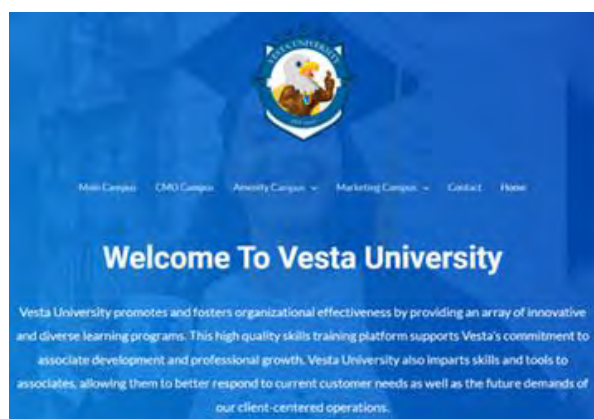
- We solicit manager feedback via **annual surveys** to ensure we are fully engaging, empowering and satisfying our onsite leadership teams.



- Most importantly, we actively foster our culture based upon our Vesta Core Values. One way we do this is through our annual "**Eagle Pride Day**".



- **Vesta University** is our website-based training resource that provides third party vendor training aids as well as internally created Vesta-specific content developed by our subject matter experts. These training aids vary from videos to PowerPoint critical skill modules.





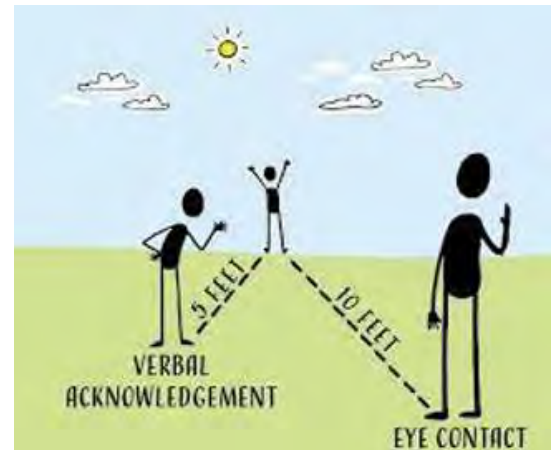
Customer Service Training

Vesta has over four hours of Customer Service Training modules featuring valuable information conveyed through presentation slides, video reenactments, and hands-on, role-play exercises that we developed to provide all of our team members with the very best in Customer Service Training.

These modules include specific training for hourly staff, mid-level managers, and general managers, and have been custom-made by Vesta to fit our specific needs.

Some of our training topics include the following:

- What is customer service?
- How to deliver proper customer service?
- Customer service challenges and potential solutions
- Defining our customers
- Identifying conflicts of all types and how to deescalate and resolve
- Body language and perception
- Anticipation
- Following through and following up
- Service recovery
- The HEART Model
- The 10-5 Rule



“As long time active residents of Bartram Springs we are writing this letter to commend two of the girls who run the clubhouse and all the activities involved. Jayne and Julie are exceptional and an asset to the community. They are always welcoming and helpful to anyone who comes to the office, whether a long-time resident or a potential resident. They have both gone above and beyond in assisting with the year long Food Drive and the Christmas Toy Drive, which has made both drives so successful. Our community is lucky to have these girls.

Marty and Mimi Kaufman, Bartram Springs Residents





Management Training

We bring our General Managers, Amenity Managers and Lifestyle Directors together twice a year before and after the peak season to conduct training, prep and debrief the peak season and to network. We do the same with our Field Operations managers annually.

Some of our recent agenda topics have included the following:

- Customer Service Training
- Post Season Debriefs
- Annual Manager Survey results and action items
- Pre-Season Operational Initiatives
- Lifestyle Initiatives
- Team Building
- Topical Breakouts
- Operational Tools
- Performance Management
- Staffing Strategies
- Financial Analysis
- Training Development
- Retention Strategies
- Payroll Management and Reporting
- Results of operational pilots
- Team Member Check-Ins
- Insurance
- Checklist Management
- OnBoarding
- Townhall with CEO



“ My family and I moved into Bartram Springs in the spring of 2019. Since then, we have not regretted our decision, and that is in part due to the Vesta team and the programs that they offer. I have two kids, 9 and 7, and they are super active within the community and the Vesta programs. So much so that when we are at the amenity center they feel like mini-celebrities due to the staff knowing who they are, seeking them out to say hello or give a hug/high-five. They attend almost all Kids Activity Nights, the summer camp, Christmas activities...you name it, we've done it! Sue and Stephanie are wonderful ladies who are doing great things for our community. We are all truly blessed to have a partnership with Vesta and Vesta should feel so blessed to have such wonderful staff that truly cares.

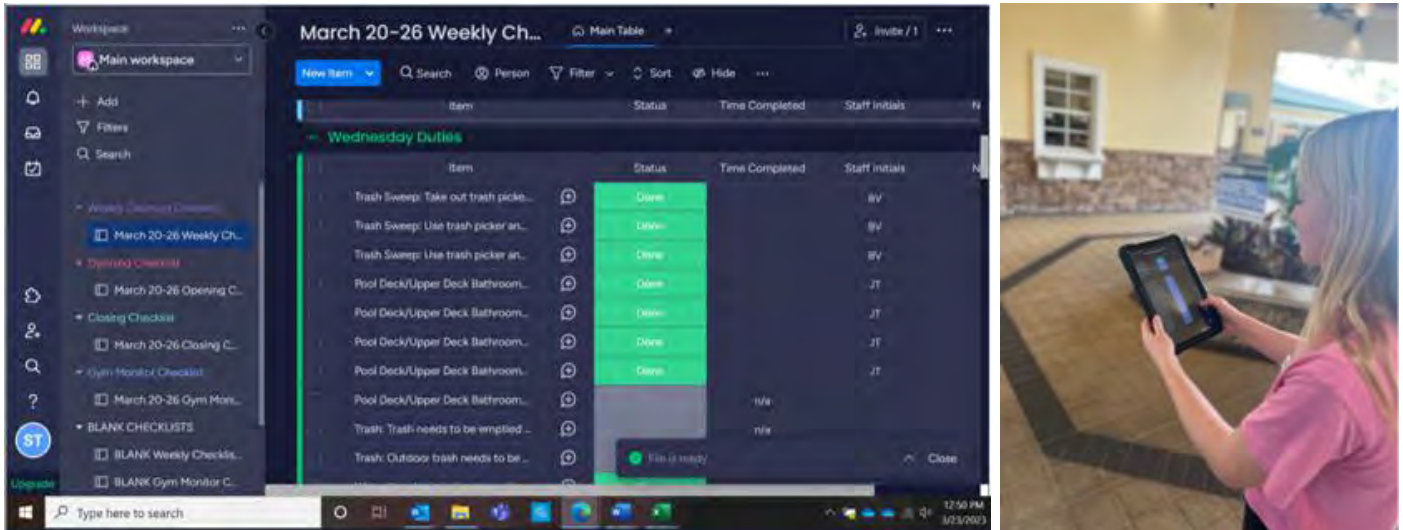
Anna Mitchell, Bartram Springs CDD Resident





Operational Checklists

We customize checklists (electronically with a Tablet PC) for onsite team members to use for each facility, covering our scope-of-services, CDD policies and procedures, and our own best practices. These checklists are used for documenting completion of tasks, training and coaching purposes.



The checklists are completed by the team member during the course of their shift and time stamped. Our manager then can pull up the completed checklist and spot-check employees to provide feedback and coaching as necessary. The checklists are dynamic and updated as necessary by operational environment to stay as proactive as possible. Edits can be made remotely based on real time resident feedback. Results can be saved and imported into Excel as needed.

September 12-18 Weekly Checklist Board					Powered by monday.com
Monday Duties					
Name	Status	Time Completed	Staff Initials	Notes	
Flex Space: Sweep the Floor	Done	8:22	KM	gauge in floor tile between women's restroom and drinking fountain	
Flex Space: Windex the Mirrors	Done	9:18	KM	Need more cleaner	
Flex Space: Windex Sue and Winslow's Office Door (inside and outside)	Done	9:35	KM		
Flex Space: Windex Flex Space Door (inside and outside)	Done	9:43	KM		
Pool Deck/Fire Pit/Upper Deck: Straighten all furniture	Done	10:58	SC		
Pool Deck/Fire Pit/Upper Deck: Wipe all tables with gym wipes	Done	1:32	SC		
Pool Deck/Fire Pit/Upper Deck: Wipe all trash cans with gym wipes	Done	1:55	SC		
Trash: Trash needs to be emptied in Office, Club Suite, Flex Space, Locker Rooms, Upper Bathrooms, Social Hall, and Pool Deck Bathrooms	None	2:41	SC		
Trash: Outdoor trash needs to be emptied by the front gate and by the Social Hall					
Water plants in stone planters by front gate					
Facility Sweep @ 2 PM	Done	2:15	SC	Walk through all bathrooms, facility rooms, and pool deck. Makes sure all areas are clean, trash isn't overflowing, and are stocked properly.	
Facility Sweep @ 3 PM	None	3:21	KM	Walk through all bathrooms, facility rooms, and pool deck. Makes sure all areas are clean, trash isn't overflowing, and are stocked properly.	
Facility Sweep @ 4 PM	Done	4:18	KM	Walk through all bathrooms, facility rooms, and pool deck. Makes sure all areas are clean, trash isn't overflowing, and are stocked properly.	
Facility Sweep @ 5 PM	None	5:42	GL	Walk through all bathrooms, facility rooms, and pool deck. Makes sure all areas are clean, trash isn't overflowing, and are stocked properly.	
Facility Sweep @ 6 PM	None	KM	GL	Walk through all bathrooms, facility rooms, and pool deck. Makes sure all areas are clean, trash isn't overflowing, and are stocked properly.	
Facility Sweep @ 7 PM	None	KM	GL	Walk through all bathrooms, facility rooms, and pool deck. Makes sure all areas are clean, trash isn't overflowing, and are stocked properly.	



GENERAL DESCRIPTION OF DISTRICT FACILITIES TO BE MANAGED

The Bartram Springs Community Development District is located within the City of Jacksonville, Florida. The District owns, operates, and maintains various common areas, including ponds, landscape tracts, and conservation areas, and amenity facilities generally consisting of a club house, pools, fitness center, tennis courts, and dog park.

Property Management Services Proposal

SCOPE-OF-SERVICES

General Manager – This position directs and coordinates all activities of the Field Operations, Facility, and Lifestyle teams. Responsibilities and duties include:

- Create an atmosphere of First-Class Service to residents through exemplary customer service experiences, engaging events, and maintenance of a “resort ready” Amenity Center.
 - Hire, train, support and coach Management and Clubhouse Personnel
 - Resolve escalated customer service challenges or issues
 - Ensure appropriate execution of District Amenity Policies
- Manage Vesta P&L, including:
 - Proper monthly billing to the District for contracted and non-contracted services
 - Oversight for revenue collection and sharing with the District
 - Expense control for Programming and Vesta-sponsored events
- Manage District budget, including:
 - Operational expenses, special events, Holiday decorations
 - Capital Reserve projects
- Facilitate consistent communications with Field Operations Manager and Maintenance team to assist in priority setting and direction of key projects, maintenance and repairs.
 - Track times to completion, cost, and other pertinent information for projects completed in house
 - Ensure adherence to contracted services, time to completion, and any other pertinent information for projects requiring outside vendors
 - Assist in strategic planning of capital projects
 - Receive all proposals and monthly board report documents to compile and submit to the District
- Facilitate consistent communications with the Amenity Manager/Lifestyle Director to assist with priority setting and direction of key projects, events, and programming
 - Support seasonal hiring efforts via internet recruitment, job fair, and referrals for Lifeguard and Summer Camp staff
 - Maintain strong relationships with Vesta programming department (Amenity Athletics, Regional Lifestyle Director) and third party vendors (fitness, swim lessons, swim team)

- Provide any necessary follow-up with residents and/or the Board on incident reports, security breaches, or violation of rules or policy
 - Oversee yearly Resident Access Card audit
 - Receive all monthly board report documents to compile and submit to the District
- Maintain positive relationships and communications with the District Manager and Board of Supervisors
 - Monthly reporting/presenting at Board meetings and workshops
 - Providing necessary information to Board in between meetings regarding project updates, major equipment failures or anything resulting in Amenity closure, security breaches or acts of vandalism, briefings on any resident brought before the Board for suspension of privileges, etc.
- Individual project partnerships with appointed board members providing oversight
- Deliver effective presentations/public speaking in Board meetings, at community events, and in staff trainings and meetings
- Assist the Board in creating pertinent and effective Amenity Center policy
- Execute regular facility walk-through/inspections with Field Operations and Amenity Managers and creating a priority list of repairs/maintenance based on those walk-throughs
- Create and implement regular resident surveys to gain feedback on all aspects of the Amenity center, including policy, event/private rental satisfaction, fitness center and offerings, facility maintenance, etc.
- Create positive and effective resident communications via E-blast and social media regarding emergent issues like closures due to inclement weather, water main break procedures, or other situations that require a specific operating procedure
- Provide support to Clubhouse staff for large scale events such as Election Day, Swim Meets, etc.
- Host seasonal New Resident Meetups to meet newly registered residents and answer all of their questions
- Make regular deposits of Vesta monies collected for staffing fees or from third party vendors
- Bring funds collected on behalf of the CDD to the GMS office twice monthly in the summertime, monthly in the off season

Field Operations Manager – Provides day to day oversight of all District common areas and assets.

- Administer contract execution/compliance of all District contractors on both a project based and ongoing basis
 - Landscape
 - Pond Maintenance
 - Stormwater Management
 - Pool Service
- With General Manager, manage both the Vesta and District maintenance and repair budgets and Capital Improvement costs
- Submit monthly board reports and proposals to General Manager 3 days prior to District submission deadline
- Write detailed scope of work for projects requiring outsourcing. Acquire appropriate work estimates and present to the Board as necessary
- Ensure all outside contractors meet all terms and conditions as written
- Provide timely responses to resident requests for service and complete as expeditiously as possible

- Working with General Manager, remain fully aware of all safety and security issues or hazards within the community, communicating with appropriate District personnel and recommending or implementing appropriate corrective action or recommendations accordingly
- Maintain full knowledge of community landscaping, lake and wetland management
- Have advanced knowledge of electrical, plumbing, carpentry, painting, pools and other recreational management skills
- Assist in negotiating, purchasing and bidding of contracted services
- Monitor conservation areas
- Coordinate major repairs through District management
- Survey and maintain all community lighting
- Ensure debris does not collect and is removed from outfall structures to prevent flooding issues
- Along with General Manager, implement District-approved capital projects and acquire a minimum of 3 bids on any recommended capital improvements
- Advise the District of necessary repairs, extraordinary cleaning, or replacement of items due to normal wear and tear, acts of God, or vandalism and secure cost estimates
- Maintain inventory of maintenance items and system of preventative maintenance
- Complete repairs and projects in house when able

Senior Maintenance Technician – Full time support for Field Operations Manager in Maintenance and Repair projects

- Is able to complete a variety of light plumbing, electrical, carpentry and paint work
- Assists with pools including vacuuming and filtration systems
- Maintains chemical balance of pools
- Routinely walks the grounds and reports any landscape, irrigation or security issues to management
- Assists Field Operations Manager with any key projects to be completed in house that would provide potential savings to the District versus outsourcing

Maintenance Technician – Part time support for Field Operations Manager that performs general light maintenance work

- Blows off entire pool deck, removes debris from pool
- Maintains pet waste stations
- Pressure washes Veterans Park bathrooms weekly
- Removes trash and debris from Veterans park
- Pressure washes when necessary
- Blows off tennis/pickleball court
- Rakes volleyball court
- Brushes down cobwebs/spider nests, cleans bugs out of light fixtures
- Other duties as assigned by Field Operations Manager or General Manager

Facility Manager/Lifestyle Director – Maintains daily operations of the Amenity Center while creating and executing engaging events and programming for residents.

- Welcome residents and registered guests into the facility, giving tours, and otherwise providing positive Guest Services experiences
- Ensure proper registration of new residents in accordance with District policy
- Conduct regular walk throughs of facility to ensure opening, closing and cleaning checklist items are being completed and cleanliness maintained
- Communicate maintenance issues, irregular pool chems, needed fitness equipment repairs, janitorial issues, pests/rodents, etc, to Field Operations Manager via GroupMe and/or the Google Doc
- Create/Plan/Execute fun and engaging events year-round for a variety of the demographics living at Bartram Springs
- Manage Special Events budget
- Create staff schedules for Clubhouse, Seasonal, Private Rental, and Special Event staff
- Provide continued training opportunities for Clubhouse and Seasonal staff
- Supervise room setup for events and private rentals in the Social Hall, in the Pool Deck Gazebos, and at the Athletic Field
- Ensure residents are following District Policy for utilizing the Amenities, provide guidance and information to residents who are not following policy, and provide thorough incident reports to General Manager for situations that require escalation
- Provide additional Pool Deck supervision during peak hours of the summer season
- Summer Camp
 - Create and/or update camp curriculum yearly, including themes, activities, crafts, and special guests
 - Hire, train and manage seasonal Summer Camp staff including one Camp Director and 6+ Camp Counselors that work from early June to early August. Training includes CPR/First Aid/AED certification, molestation training, and site-specific camp orientation.
 - Manage registrations, refunds, collections, and all welcome and policy communications to camp parents
 - With the Camp Director, manage discipline for campers who may be acting out or not in accordance with Summer Camp policy, communicate with parents, strategize a redirection plan, and in some instances remove campers from the program
- Lifeguard Season
 - Hire, schedule and coordinate Red Cross Lifeguard certification/recertification for a staff of up to 20 seasonal lifeguards to work from Spring Break in March through September 30th
 - Provide continuing education and training opportunities for staff on both Bartram Policy and Lifeguard safety and alertness
 - Write and deliver check-ins (brief performance review summaries) with staff halfway through the season

Senior Guest Services Attendant – Performs all aspects of a Guest Services Attendant, along with the following:

- Guest Service Attendant new employee training
- Private Rental Booking/Supervision
- Yearly Audit Management
- Weekly Update/Monthly Newsletter Creation utilizing Constant Contact, Poster My Wall and Canva
- Create and send issue-specific eblasts when necessary
- Website Update/Maintenance
- Summer Camp Admin (registrations, cancellations, weekly camp parent updates, weekly welcome emails)
- Supply Inventory/Purchasing

Guest Services Attendant – The primary resident experience employee in the front office who welcomes patrons to the Amenity Center and assists with their needs.

- Greet residents and their guests as they enter the facility
- Monitor the badge system as residents enter to ensure they are current, enforce age policy if young people come in without adults
- Answer new residents inquiries about how to register for access, collect all necessary paperwork, take photos and assign access cards
- Perform light cleaning duties in the opening and closing checklists, including things like changing out garbage bags, refilling the soap/paper towel/toilet paper dispensers, Windex mirrors, dust in the gym, clean and arrange the Social Hall for private rentals or special events. Unlocking bathrooms, the Social Hall and Club Suite in the mornings. Picking up trash around the outside perimeter of the Amenity Center and parking lot.
- Doing regular walk-throughs of the facility to check supplies in the restroom and fitness center and to monitor activity
- Informing residents of CDD Amenity Center policy when necessary
- Assisting residents with private rental information and scheduling, accepting payments and signed agreements, and providing information about all rental policy
- Checking out private rentals at the end of the night by going through the cleaning checklist with them and noting any damages or incomplete checklist items for management
- Helping residents register for Tennis/Pickleball/Volleyball courts or make reservations for special events through SignUpGenius
- Register residents for overnight parking passes for oversized vehicles
- Assist pool deck staff with inclement weather closure confirmations, Code Brown documentation, incident/first aid reports
- Assist Summer Camp staff with dropoff/pickup, including the checking of identification and signing in/signing out of campers
- Help monitor swim team participants during practice and swim lesson participants to ensure non-residents exit when the practice/lesson ends
- Accept payments for access cards, guest passes, any special event that requires a fee, and food truck payments
- Answer phones, direct calls, take detailed messages when necessary
- Light computer work including resident registration into the database, utilizing SignUpGenius, answering email, checking weather radar, looking property up on Jax Property Appraiser

Fitness Center Monitor – Monitors gym activity and performs light cleaning duties in the Fitness Center from 7PM – 11PM nightly.

- Performs light cleaning work in the gym including wiping down equipment, Windexing mirrors and windows, changing garbage, restocking supplies
- Ensures residents understand and follow gym policies including age policy, footwear, personal training, etiquette, etc.
- Completes walk-throughs of the gym every 30 minutes once the office is closed to be available for questions and to monitor for appropriate usage
- Completes cleaning checklist using the Monday app and photo submissions to validate walk throughs and cleaning projects are completed
- Monitors activity on the security cameras of all areas of the Amenity Center in between gym walks
- Does final walk/inspection and light turnoff at 11PM, shuts down office and locks window and door upon exiting

Lead Lifeguard/Pool Supervisor – Performs all duties of a lifeguard, along with the following:

- Liaison between Pool Deck and Office.
- Advanced understanding of pool rules, can handle escalated customer service issues, calls for closures (Code Brown, Inclement weather, etc)
- Monitors parties and pool activities, lap pool management, Swim Practice/Meets, Swim lessons
- Calls for Adult Swim at 10 minutes before each hour, and manages lifeguard station rotation at the top of every hour
- Works opposite of Facility Manager or General Manager so we have management from open to close
- Assists Amenity Manager with ongoing training/Inservice/staff meetings
- Performs regular audits with Lifeguards to facilitate alertness and keep emergency skills fresh
- Assists Facility Manager with scheduling, getting subs, or covering call outs
- Guide lifeguard staff in cleaning or other duties assigned by office during inclement weather closures

Lifeguard – Continuously monitors water slide and pool activity to prevent drowning

- Currently certified as a lifeguard (including CPR/First Aid/AED) through the Red Cross or another accredited certifying institution
- Monitors all slide and pool activity to ensure compliance with CDD policies and to prevent drowning or injury
- Ready to respond quickly to emergencies, potential emergencies, or hazards
- Can convey District pool and pool deck policy to residents when necessary
- Complete thorough incident reports for any safety, injury, or behavioral issues that need to be reported to Management
- Complete daily checklist of opening and closing activities which include regular testing of pool chemistry, light cleaning around the pool deck, setup of lifeguard stations
- Observe weather conditions and report thunder or lightning to Management staff for radar confirmation prior to an inclement weather closure
- Call Adult Swim for 10 minutes every hour so children take a break from pool activities, and guards can rest eyes, hydrate and rotate stations to support alertness
- Perform protocol for Code Browns or Code Adams
- Report any damaged equipment, safety hazards or unsafe conditions to management
- During inclement weather closures, performing additional cleaning duties as assigned by office staff

Pool/Deck Monitor – Provides an added layer of customer service and safety monitoring on the pool deck. Does not need to be a lifeguard.

- Greets all patrons
- Assists staff in informing and enforcing CDD Pool Deck policy
- Help office staff/management identify non-residents or non-authorized users of the pool deck area
- Monitor Gazebo parties to ensure compliance with rental agreement and CDD policy
- Can work on the slide tower to assist with “crowd control” making sure slide users go one at a time and in a way that is in accordance with CDD policy
- Maintain a neat and presentable pool deck, arranging furniture, cleaning off surfaces, removing trash as necessary



“

We are writing to express our sincere appreciation of the outstanding work of your team. Your dedication, professionalism and commitment to excellence in serving our community has enhanced our experience of living in Bartram Springs. We have been homeowners here since 2005 and our daughter Misha grew up being part of the Swim Team through the years she was in middle and high school. We have actively enjoyed using the club house for various family functions including her sweet 16th party, graduation party and her bridal shower as well this year.

We have been regularly using much of the amenities through the years and more so now in our retirement years to extent we have come to appreciate what you all do through the whole year into maintaining them. Be it communal spaces, organizing engaging events to different age groups, seasonal festivities, maintaining cleanly and safe spaces for enjoying the activities from regular Friday food trucks, monthly family movie nights, seasonal activities like Polar dips, spring garage sales, food drives and countless other activities you all organize and execute so well being proactive to needs and demands of the community. I am aware of how demanding we homeowners can be and to please everybody is not a small task.

Your team's efficiency, attention to detail, friendly demeanor makes interacting with all of them a pleasure. The approach of going above and beyond in order to ensure residents feel heard and valued by your team enhances our harmonious living experience we enjoy very much. We want to thank you all for the hard work and dedication you all have shown while you do your jobs. You all make a difference in our lives. We whole heartedly commend your work and your team's work.

”

Madan and Uma Mohan, Bartram Springs CDD Residents



We had a great experience having a party at the clubhouse. Staff helped us in bringing things in and out, checked on us, we even offered them a plate of food after our guests all helped themselves! I know some of them are young, but they were all very friendly and willing to help! I know its awkward to come in and remind hosts when a party is supposed to end, but our girl was very nice about it and even helped us clean up. Great price and I was proud of my clubhouse amenity.



Bartram Springs CDD Resident, taken from the Private Rental Survey

PROPOSAL FORMS

GENERAL PROPOSER INFORMATION

- *Proposer General Information:*

Proposer Name Vesta Property Services, Inc.

Street Address 245 Riverside Avenue #300

P. O. Box (if any)

City State Zip Code Jacksonville, Florida 32202

Telephone (904) 355-1831 Fax no. (904) 355-1832

1st Contact Name Jay King Title Regional Vice President

2nd Contact Name Ginger Anzalone Title Regional President

Parent Company Name (if any) PMG Holdings

Street Address 5401 N. Central Expressway #290

P. O. Box (if any)

City Dallas State TX Zip Code 75205

Telephone (214) 272-4074 Fax no. (214) 751-2397

1st Contact Name Jose B. Maldonado Title Treasurer

2nd Contact Name Jason Villalba Title Secretary

- Company Standing:

Proposer's Corporate Form: **Corporation**

(e.g., individual, corporation, partnership, limited liability company, etc.)

In what State was the Proposer organized? **Florida** Date **November 12, 1995**

Is the Proposer in good standing with that State? Yes **X** No

If no, please explain

Is the Proposer registered with the State of Florida, Division of Corporations and authorized to do business in Florida? Yes **X** Charter No. **P95000090161**

If no, please explain

- What are the Proposer's current insurance limits?

General Liability **\$1,000,000**

Automobile Liability **\$5,000,000**

Workers Compensation **\$1,000,000**

Expiration Date **01/01/2025**

- Licensure – Please list all applicable state and federal licenses, and state whether such licenses are presently in good standing:

Type of registration: Community Association Management Firm License

License No. #CAB3970 Expiration Date: 09/30/2024

Qualifying Individual: Lisa Ann Manzione Title: CAM / Regional President



On a separate document to be included with your submittal, please provide responses to the following:

- Provide details regarding the benefits you provide your employees (please differentiate between PT and FT)

MEDICAL
Bronze Plan - Copays for common services such as primary care visits, specialists, urgent care, and emergency room.
Silver Plan - Health Savings Account (HSA) compatible plan with a lower deductible and coinsurance.
Gold Plan - Lowest deductible and out-of-pocket maximum with copays on common services.
Employees enrolled in the Bronze and Gold plan also have the opportunity to elect a **GAP supplemental plan** that can assist with offsetting medical costs.

DENTAL
Dental HMO - Lowest cost plan with copays for dental services. Services can only be rendered through in-network providers.
Dental PPO Low - Receive services from in or out-of-network providers. Ortho coverage is included.
Dental PPO High - Receive services from in or out-of-network providers. This plan has higher benefit maximum and lower coinsurance. Ortho is included.

LIFE INSURANCE
Basic Life and AD&D coverage is provided in the amount of 1 x your basic annual earnings up to \$50,000. Over 65 age reductions apply. This is provided to you at no cost!
Employees can purchase additional life insurance for themselves, their spouse, and eligible dependent children. New hires can elect coverage up to the guarantee issue amount without having to submit a medical questionnaire.

VISION
Receive services from in or out-of-network providers. This plan includes an allowance for frames (every two years) or contact lenses (every year). Small copay for eye exam and materials.

VOLUNTARY BENEFITS
Accident - High and a Low option. Receive payment when you or a covered family member experience an unplanned emergency such as fractures, dislocations, burns.
Critical Illness - Receive payment if you or a covered dependent are diagnosed with a critical medical condition such as cancer, heart attack, stroke.
Hospital Indemnity - Receive payment if you or a covered dependent are admitted to the hospital for unexpected medical emergency.

DISABILITY INSURANCE
Short Term Disability Coverage (STD) and Long Term Disability Coverage (LTD) are available. Receive 60% of your basic annual earnings for a designated benefit period when you are unable to work. This provides coverage for injury, sickness, or pregnancy.

PET DISCOUNT PLAN
Pet Assure Veterinary Discount Plan can save enrollees up to 25% on all in-house medical services at participating veterinarian clinics.

SPENDING ACCOUNTS
Contribute pre-tax dollars to a Flexible Spending Account (FSA) compatible with the Bronze and Gold Plan or a Health Savings Account (HSA) compatible with the Silver Plan. Use funds to pay for eligible medical expenses. Vesta does provide an employer contribution on the HSA!
You may also contribute pre-tax dollars to a Dependent Care Flexible Spending Account. Use the funds to pay for eligible childcare expenses.

LEGAL
Access a network of attorneys that can assist with legal matters such as traffic, estate, family law and more. Most attorney fees are covered 100%.

401K PLAN
Eligible employees can participate after 90 days of employment. For more information and to enroll in the plan, log onto www.paychexflex.com or call Paychex at 877-244-1771.



- **Part-Time and Full-Time associates are able to enroll in the 401 (k) plan after 90 days**
- Provide resumes/profile for all proposed salaried (General Manager, Field Operations Manager, Facility Manager/Lifestyle Director, etc.) onsite staff and those providing direct corporate support. **Please see page 12 - 14.**
- Describe and provide examples of your approach to resident engagement. (e-blasts, mobile apps, website, surveying, social media, newsletters, etc.)
 - **Please view examples and approach on Pages 16 - 18.**
- Provide examples of recent Board Reporting for similar sized communities. (Amenity Manager Report, Lifestyle Report, Event Recap, Project Trackers, etc.)
 - **Please view examples and approach on Pages 21 - 23.**
- Describe training provided to employees (HR, job specific, certifications, etc.)
 - **Please view examples and approach on Pages 26 and 29 - 30.**
- Describe your approach to quality assurance with respect to the services you are proposing. What processes/tools do you use to ensure the quality of services you provide?
 - **Please view examples and approach on Pages 19 - 32.**

Describe what support onsite personnel get from corporate? (Operational Management, Payroll Support, HR, IT, Accounts Payable, etc.)

- **Jay King, our Regional Vice President, provides primary, direct support to our Bartram Springs Staff. He is onsite at Bartram Springs most days as either a resident (since 2007) or to support the onsite team. He meets with Sue and Winslow either in person or virtually as needed, and is always available by phone, and attends the majority of CDD meetings and workshops. Jay further assists by connecting Sue and Winslow with internal and external resources as needed, as issues arise. He also assists Board members and District Staff as needed. Jay has almost 30 years of leadership experience, with the U.S. Navy, The Home Depot, CSX Transportation, and Vesta. Jay and his wife Laura raised their family in Bartram Springs and they have been active in the community coaching soccer, serving on the CDD Board, participating in a long running neighborhood bible study, Parent Teacher's Associations and School Advisory Councils spanning Bartram Springs Elementary School and Twin Lakes Academy Middle School. Jay has been with Vesta since 2017.**
- **Jacquelyn Chau, our Regional HR Business Partner, is on site regularly at Bartram Springs to ensure that she is accessible and fully able to provide HR support with training, coaching, performance management, benefits information, payroll issues, staffing issues, and all other HR matters. She is always available by phone for any issues that arise. Jackie has over 14 years of Human Resource experience ranging from recruiting, compliance, talent management, payroll and workforce planning. She spent 8 years at Massage Envy as a regional manager supporting over 200 employees. As a HRBP, her role is to be a strategic business partner to Jay, Sue, and the entire Bartram Springs team. Jacquelyn assists with leading initiatives to improve talent management, performance management, retention, and workforce planning. She is the primary contact for team members and managers to ensure a professional level of employee relations, company policies, HRIS support and State and Federal HR compliance. She is in a constant state of movement as she visits all of our communities on a regular basis. Jackie has been with Vesta since 2017.**
- **Ross Ruben, our Regional Lifestyle Director, works with Sue and Stephanie on planning events and implementing programming and connecting them with various related resources and peer networking. Ross facilitates regular meetings between all of our lifestyle team members to share best practices. He also heads up our Amenity Athletics and summer camp programming. Ross has more than 20 years in the entertainment, events, and recreation industry, he has a diverse background, which includes acting for theatre, DJ and MC work for top entertainment companies across the country, and eight years as a full-time professional stuntman for film and television. Ross has worked for companies including MTV Networks, Anheuser-Busch, Universal Studios, and the YMCA. Ross has been with Vesta since 2016.**

- **Dan Fagen, our Regional Director of Amenity Services, supports Winslow and his maintenance, janitorial, pool and field operations responsibilities as needed - primarily in terms of connecting Winslow with vendor-and-peer resources as he encounters onsite issues. He also supports Bartram Springs with added maintenance staffing and coverage as needed. Dan has more than 30 years of experience in the our industry. Dan has been with Vesta since 2006.**
- **Sean Smith, our Regional Aquatics Safety Director, provides support to Sue and Stephanie with respect to all things pool safety to include recruiting, lifeguard certification, and quality assurance. Sean has worked as an Aquatics Director in several communities including Fleming Island Plantation and Julington Creek Plantation, managing seasonal staff numbers of over 120 employees during peak times of the year. He holds a Lifeguard and Lifeguard Instructor certification with the American Red Cross and provides a pivotal role in the certifying and training of all Aquatics Employees across our company. Sean has been with Vesta since 2008.**
- **Charlotte Whitehead, our Regional Administration Manager, provides support with payroll, expense management, staffing and various administrative tasks. Additional specialized support is available from Francesca Gay, our Corporate Payroll Coordinator and Sandra Rivera our Corporate Talent Acquisition Manager. Charlotte has over 14 years of administrative experience. Charlotte has been with Vesta since 2016.**
- **Priscila Gieselman, our Regional Accounting Manager, works with Sue to provide financial reporting and troubleshooting. She provides all Vesta invoicing to the District, as well as accounting and Vesta payments for the District's revenue share from Vesta's lifestyle programming. Priscila has more than 16 years of accounting experience. She conducts periodic financial meetings with Sue to ensure we are capturing and understanding all of our revenue and expenses. Priscila joined Vesta in 2017.**



EXPERIENCE

- *Has the Proposer performed work for a community development district or master planned residential community in excess of 200 acres previously? **YES***

Project Name/Location: **Kings Point Golf & Country Club** / Delray Beach, FL

Contact: Frank Iovine Contact Phone: (561) 302-8803

Project Type/Description: HOA of 7,200 units (built-out)

Dollar Amount of Contract: \$6,156,000

Scope of Services for Project: Amenity Management, Field Operations Management, Maintenance Services, turnkey F & B Operations, Lifestyle Programs, Community Transportation Services, Golf Course Operations, Theatre Operations, and Pool Monitor Services.

Dates Serviced: 1993- Present



Project Name/Location: **Julington Creek Plantation CDD**

Contact: Michael Morton Contact Phone:

Project Type/Description: CDD of 5,800 homes (built-out)

Dollar Amount of Contract: \$1,650,000 (+ Cafe w/ \$185K in annual sales)

Scope of Services for Project: Amenity Management & Staffing, Field Operations Management, Facility Maintenance Services, turnkey Café Operation, Lifeguard Staffing, and Lifestyle Programs & Events.

Dates Serviced: 2017 - Present



Project Name/Location: **Kings Point Sun City Center** / Sun City Center, Fla.

Contact: Jack Davidson Contact Phone: (256) 341-8613

Project Type/Description: HOA of 5,600 homes (built-out)

Scope of Services for Project: Amenity Management, Field Operations Management, Maintenance Services, turnkey F & B Operations, Lifestyle Programs, Community Transportation Services, and Gatehouse Staffing.

Dates Serviced: 2008 - Present



Project Name/Location: **Sampson Creek CDD** / Saint Johns, Florida

Contact: Mike Yuro Contact: yurocdd@gmail.com

Project Type/Description: CDD of 800 homes (built-out)

Dollar Amount of Contract: \$

Scope of Services for Project: Amenity Management, Field Operations Management, Maintenance Services, Lifestyle Programs, and Lifeguard Services.

Dates Serviced: October 2023 - Present



Project Name/Location: **Rivers Edge CDD ("RiverTown")** / Saint Johns, FL

Contact: Mac McIntyre Contact Phone: (850) 496-5510

Project Type/Description: CDD of 4,400 homes at build-out

Dollar Amount of Contract: \$769,000 (+ Cafe w/ \$755K in annual sales)

Scope of Services for Project: Amenity Management, Field Operations Management, Facility Maintenance Services, turnkey Café Operation, Lifeguard Staffing, and Lifestyle Programs & Events.

Dates Serviced: 2015 - Present



EXPERIENCE

Project Name/Location: **Marshall Creek CDD** / Saint Augustine, Florida
Contact: Richard Luciano Contact Phone: richluciano.cdd@gmail.com
Project Type/Description: CDD of 2000 homes (built-out)
Dollar Amount of Contract: \$
Scope of Services for Project: General Manager and Assistant Manager
Dates Serviced: August 2023 - Present



Project Name/Location: **Durbin Crossing CDD** / Saint Johns, Florida
Contact: Peter Pollicino Contact Phone: (973) 713-7384
Project Type/Description: CDD of 2,600 homes (built-out)
Dollar Amount of Contract: \$568,000
Scope of Services for Project: Amenity Management, Field Operations Management, Maintenance Services, Lifestyle Programs, Lifeguard Services, and Facility Monitoring.
Dates Serviced: 2008 - Present



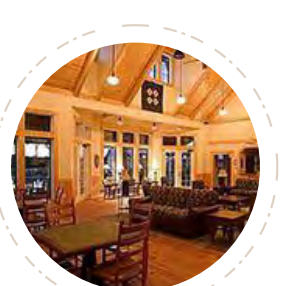
Project Name/Location: **Bartram Springs CDD** / Jacksonville, Florida
Contact: Jim Oliver (District Mgr.) Contact Phone: (904) 315-4649
Project Type/Description: CDD of 1,694 homes (built-out)
Dollar Amount of Contract: \$510,000
Scope of Services for Project: Amenity Management, Field Operations Management, Facilities Maintenance Services, Lifestyle Programs, and Lifeguard Services.
Dates Serviced: 2005 - Present



Project Name/Location: **Grand Haven CDD** / Palm Coast, Florida
Contact: Barry Kloptosky (CDD Ops. Mgr.) Contact Phone: (386) 715-6081
Project Type/Description: CDD with 1,895 homes (built-out)
Dollar Amount of Contract: \$839,000 (+ Cafe w/ \$980k in annual sales)
Scope of Services for Project: Amenities Management, Restaurant & Bar (Turnkey Operation), Facilities Maintenance, and Lifestyle Programs.
Dates Serviced: 2007 - Present



Project Name/Location: **Heritage Landing CDD** / Saint Johns, Florida
Contact: Michael Taylor Contact Phone: (603) 627-8467
Project Type/Description: CDD of 1,151 homes (built-out)
Dollar Amount of Contract: \$464,000
Scope of Services for Project: Amenity Management, Field Operations Management, Facilities Maintenance Services, Lifestyle Programs, and Lifeguard Services.
Dates Serviced: 2006 - Present



Community References (List all CDDs/HOAs where Amenity Services are currently provided)

Community Name	Indicate CDD or HOA	Total # of Households Occupied as of 10/1/2023 (1)	County Community is Located	Yrs & Months Contract Managed by Proposer	2022 Total Fee Charged CDD/HOA for Services	CDD Chair/HOA President Name & Email
Avenir	CDD	600	Palm Beach	2 years	\$550,000	Virginia Cepero vccepero@avenired.org
Bartram Creek	HOA	320	St. Johns	4.5 years	\$36,401	Debbie Bisogno dbisogno@sovereign-jacobs.com
Beach CDD (Tamaya)	CDD	1,000	Duval	3 years	\$165,000	Matt Calderaro boardmember5@beachcdd.com
Brandy Creek CDD (Johns Creek)	CDD	600	St. Johns	8 years	\$203,825	Meredith Payne Mercey1065@gmail.com
Brightmore at Wellen Park*	HOA	0	Hillsborough	5 months	\$150,000	Mattamy Homes (Developer)
Cabot Citrus Farms*	CDD	0	Hillsborough	1 month	\$318,558	Cabot (Developer)
Celestina	HOA	635	St. Johns	10 yrs.	\$160,000	Scott Forshey-Friedman scottf@celestinahoa.com
Cross Creek North*	CDD	1,112	Clay	6 months	\$387,209	Robert Porter rsporter@drhorton.com
Cypress Bluff CDD (eTown)	CDD	1,700	Duval	3 years	\$242,406	Richard Ray rray@parcgroup.net
Durbin Crossing	CDD	2,600	St. Johns	16 years	\$572,980	Peter Policino peterpolicino@gmail.com
Five Towns	HOA	1,701	Pinellas	22 years	\$5,848,882	Bill Batchelor wbatchelor@hotmail.com
Glen St. Johns	CDD	850	St. Johns	8 years	\$40,000	Darren Romero Dr51212@gmail.com
Grand Haven	CDD	2,000	Flagler	17 years	\$839,779	Kevin Foley kfoley@ghcdd.com
Grand Reserve	COA	322	Duval	3 yrs.	\$289,00	John Rego john.rego09@gmail.com
Harbor Bay CDD (MiraBay)	CDD	1,400	Hillsborough	4 years	\$1,124,288	Dan Leventry leventry@harborbaycdd@gmail.com
Harbour Isles	CDD	900	Hillsborough	3 ½ years	\$111,595	Betty Fantauzzi Seat1@harbourislescdd.org
Heritage Landing	CDD	1,200	St. Johns	18 years	\$463,999	Michael Taylor taylorcdd@gmail.com
Julington Creek Plantation	CDD	5,800	St. Johns	6 years	\$1,680,746	George Duran Gdoran@icpcdd.org
Kings Point Sun City Center	HOA	5,600	Hillsborough	16 years		Jim Gundry Jgkpfed2@aol.com

Community Name	Indicate CDD or HOA	Total # of Households Occupied as of 10/1/2023 (1)	County Community is Located	Yrs & Months Contract Managed by Proposer	2022 Total Fee Charged CDD/HOA for Services	CDD Chair/HOA President Name & Email
Kings Point Golf & Country Club	HOA	7,200	Palm Beach	31 years	\$6,156,000	Jim Haggerty jhaggerty@kpmaster.com
Lakes at Bella Lago*	CDD	0	Clay	1 month	\$12,500	DJ Smith Di.smith@mattamv.com
LakeShore Ranch	CDD	720	Pasco	8 years	\$200,000	Ronald Mitchell ronaldmitchellcdd@gmail.com
Marshall Creek (Palencia)*	CDD	2,000	St. Johns	6 months	\$304,752	Richard Luciano Richluciano.cdd@gmail.com
Montecito*	CDD	450	St. Johns	8 months	\$159,912	Catherine LeCesne clecesne@montecitocdd.org
Parkland Preserve*	CDD	357	St. Johns	5 months	\$79,000	Mohammad Bataineh mohammad@mslcapital.com
Renaissance	HOA	700	Sarasota	5 ½ yrs.	\$112,000	Mattamy Homes Developer
Rivers Edge (RiverTown)	CDD	2,950+	St. Johns	9 years	\$772,325	Ahmed (Mac) McIntyre Mac.m.mcintyre@gmail.com
Yellowbluff Landing (Tison's)	CDD	680	Duval	5 years	\$215,381	Brandon Kirsch cddbrandonk@gmail.com
Sampson Creek CDD (SJGCC)	CDD	799	St. Johns	8 years	\$174,127	Graham Leary learycdd@gmail.com
Solterra*	CDD	1189	Orange	8 months	\$1,328,300	Ariane Casanova https://www.solterrareresortcdd.org/contact-form?recipient=14
Southhaven CDD (Markland)	CDD	356	St. Johns	8 years	\$153,610	Richard Fetter Dfetter172cdd@yahoo.com
Sunstone at Wellen Park*	CDD	60	Hillsborough	6 months	\$148,245	Nick Dister
Triple Creek	CDD	2,000	Hillsborough	2 ½ years	\$310,330	Alex Garces https://www.triplecreekcdd.com/contact-form?recipient=5
Venetian	CDD	1,100	Sarasota	3 years	\$1,352,113	Richard Bracco rdbacco@VCDD.org
WestLake	HOA	2,000	Palm Beach	4 ½ years	\$1,065,578	Scott Gambone SGambone@mintousa.com
The Preserve at Wilderness Lake*	CDD	940	Hillsborough	8 months	\$489,600	Holly Ruhlig supervisorwlp4@gmail.com
Wynnfield Lakes	CDD	372	Duval	3 years	\$151,098	Kristi Sweeney, kristi.sweeney@unf.edu

* Accounts added since 2022 and reflect 2023 contracts

- List the Proposer's total annual dollar value of amenity center management and grounds maintenance management* completed for each of the last five (5) years starting with the latest year and ending with the most current year.

2019 = \$22,922,060

2020 = \$24,647,376

2021 = \$26,220,613

2022 = \$28,813,860

2023 = \$32,375,124

*Vesta provides "Grounds Maintenance Management" (as part of hundreds of HOA Management agreements) as well as F & B Management, Lifestyle Programming, and Project Management services that are included in the above-dollar amounts.

- Please provide the following information for each project that is similar to this project, and that you are currently undertaking, or have undertaken, in the past five years. Attach additional sheets if necessary.
 - **See above in experience and spreadsheet.**
- Program References: Provide examples of programs that your firm is currently providing to other similar sized communities (what have you done elsewhere).

Bartram Springs 2022 and 2023 3rd Party Programming with Revenue Share

	2022	Yoga	Personal Training	Tennis	Jumping Jack	Zumba w/Derr	Dance Class	Zumbini	Running Club	Soccer Shots	Swim Lessons	TOTAL	Revenue Share to District
JAN	\$ 28.50	\$ 111.40	\$ 220.00	\$ 55.00	\$ -	\$ 356.56	\$ -	\$ -	\$ 276.00	\$ -	\$ 1,047.46	\$ 104.75	
FEB	\$ 35.00	\$ 83.50	\$ 230.00	\$ 64.00	\$ -	\$ 502.00	\$ 86.83	\$ -	\$ -	\$ -	\$ 1,001.33	\$ 100.13	
MAR	\$ 28.70	\$ 103.50	\$ 250.00	\$ 77.00	\$ -	\$ 47.00	\$ 115.34	\$ -	\$ -	\$ -	\$ 621.54	\$ 62.15	
APR	\$ 13.40	\$ 163.00	\$ 250.00	\$ 84.00	\$ -	\$ 63.00	\$ -	\$ -	\$ 616.00	\$ 508.00	\$ 1,797.40	\$ 179.74	
MAY	\$ 66.50	\$ 101.00	\$ 260.00	\$ -	\$ 21.60	\$ 54.00	\$ -	\$ 30.00	\$ -	\$ 1,899.60	\$ 2,432.70	\$ 243.27	
JUNE	\$ 28.00	\$ 71.00	\$ 250.00	\$ -	\$ 18.30	\$ -	\$ -	\$ -	\$ -	\$ 1,551.00	\$ 1,918.30	\$ 191.83	
JULY	\$ 76.50	\$ 56.50	\$ 240.00	\$ -	\$ 24.50	\$ -	\$ -	\$ -	\$ -	\$ 1,811.00	\$ 2,208.50	\$ 220.85	
AUG	\$ 64.00	\$ 49.00	\$ 250.00	\$ 84.00	\$ 15.00	\$ -	\$ -	\$ -	\$ 434.10	\$ 1,451.00	\$ 2,347.10	\$ 234.71	
SEP	\$ 100.00	\$ 48.00	\$ 250.00	\$ -	\$ 14.90	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 412.90	\$ 41.29	
OCT	\$ 100.00	\$ 42.80	\$ 250.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 392.80	\$ 39.28	
NOV	\$ 56.20	\$ 50.00	\$ 260.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 578.74	\$ -	\$ 944.94	\$ 94.49	
DEC	\$ 71.60	\$ 33.50	\$ 240.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 345.10	\$ 34.51	
Totals	\$ 668.40	\$ 913.20	\$ 2,950.00	\$ 364.00	\$ 94.30	\$ 1,022.56	\$ 202.17	\$ 30.00	\$ 1,904.84	\$ 7,320.60	\$ 15,470.07	\$ 1,547.01	

	2023	Micki Fitness	Personal Training	Tennis	Derrri Fitness	KatDance	Soccer Shots	Swim Lessons	Adult Swim	TOTALS
Month										
Jan	\$ 181.00	\$ 114.00	\$ 250.00	\$ -	\$ -	\$ 178.50	\$ -	\$ -	\$ -	\$ 723.60
Feb	\$ 117.00	\$ 60.00	\$ 240.00	\$ 2.10	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 419.10
Mar	\$ 109.00	\$ 150.00	\$ 260.00	\$ 17.85	\$ 207.90	\$ -	\$ -	\$ -	\$ -	\$ 744.75
Apr	\$ 147.90	\$ 136.50	\$ 250.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 534.40
May	\$ 150.00	\$ 211.50	\$ 250.00	\$ -	\$ 159.20	\$ 852.00	\$ 413.60	\$ -	\$ -	\$ 2,036.36
June	\$ 123.75	\$ 133.20	\$ 240.00	\$ 9.40	\$ -	\$ -	\$ 1,367.00	\$ -	\$ -	\$ 1,873.35
July	\$ 147.45	\$ 87.00	\$ 200.00	\$ -	\$ -	\$ -	\$ 1,480.00	\$ 200.00	\$ -	\$ 2,114.45
Aug	\$ 76.20	\$ 120.00	\$ 210.00	\$ -	\$ 242.00	\$ -	\$ 1,742.00	\$ -	\$ -	\$ 2,390.20
Sept	\$ 54.00	\$ 104.55	\$ 200.00	\$ -	\$ -	\$ 235.50	\$ 931.00	\$ -	\$ -	\$ 1,525.05
Oct	\$ 89.70	\$ 150.00	\$ 200.00	\$ -	\$ 268.00	\$ -	\$ 503.00	\$ -	\$ -	\$ 1,210.70
Nov	\$ 102.90	\$ 150.00	\$ -	\$ -	\$ 248.50	\$ -	\$ -	\$ -	\$ -	\$ 501.40
Dec	\$ 57.15	\$ 72.00	\$ -	\$ -	\$ 50.00	\$ 554.50	\$ -	\$ -	\$ -	\$ 733.65
Totals	\$ 1,356.05	\$ 1,488.75	\$ 2,300.00	\$ 29.35	\$ 1,175.60	\$ 1,820.66	\$ 6,436.60	\$ 200.00	\$ -	\$ 14,807.01
							% to District			\$ 1,480.70

Vesta In-House Programs: Summer Camp and Amenity Athletics

- Summer Camp -
 - **2022 - Gross: \$76,716.50 CDD % - \$7671.65**
 - **2023 - Gross: \$89,913.45 CDD % - \$8991.34**
- Amenity Athletics
 - **2022 - Gross: \$70,180.00 CDD % - \$10,201.83**
 - **2023 - Gross: 86,870.00 CDD% - 16,522.14**

2023 Program Revenue Share Total - \$26,994.18

- *Event References: Please provide examples of events conducted at other similar sized communities.*
 - **See below. View full calendars on individual community websites including: RiverTownAmenities.com, TamayaAmenities.com, DurbinCrossingLiving.com, or Heritagelandingamenities.com.**

Event Title & Description (include date of event and community name)	Total # of Households Occupied	# of Participants	Cost
Adult Only Wine Tasting 2/1/23 @ eTown, wine and chocolate pairing, residents charged \$20 to attend	1,000	45	\$290
Pirate Egg Hunt 4/8/23 @eTown foam egg hunt, mermaid, pirate, drinks, puppet show	1,000	200	\$2,300
Adult Comedy Show 4/21/23 @ eTown, residents charged \$20 to attend	1,000	50	\$0
Goat Yoga 5/13/23 @ eTown, residents charged \$40 to attend	1,000	25	\$0
Memorial Day 5/29/23 @ eTown, live music duo, bubbles, mini golf, cotton candy	1,000	200	\$1,325
Back To School Foam Party 8/11/23 @eTown, foam cannons and DJ	1,000	200	\$1,100
Luau 9/2/23@ eTown, luau show poolside	1,100	150	\$1,175
Llama Yoga 9/9/23 @ eTown, residents charged \$40 to participate	1,100	25	\$0
Dog Halloween Party 10/21/23 @eTown, dog costume contest, Got Your Back K9 For Life free training demo, free hot dog lunch provided by David Weekley	1,100	75	\$35
Holiday Vendor Fair 11/17/23 @ eTown, 35 vendors paid \$35 to participate	1,100	200	\$0
Donuts with Mrs. Claus 12/16/23 @ eTown, storyteller Debra came on site to tell stories and sing songs about the North Pole, donuts were served, residents paid \$15 per family	1,120	30	\$21
Noon Year's Eve 12/30/23 @ eTown, one foam cannon blast at noon, music and donuts served to ring in the new year	1,120	80	\$418

Back to School Bash, River's Edge CDD 1	1800	350+	\$1400
Golf & Brunch, River's Edge CDD 1, 8/20/2023	1800	120	\$550
Teen vs. Parent Obstacle Challenge. River's Edge CDD 1, 9/2/2023	1800	200+	\$450
Mixology Class (21+ only, ticketed \$15 per person), River's Edge CDD 1, 9/15/2023	1800	50 (capped)	\$880
Fall Festival, River's Edge CDD 1, 10/15/2023	1800	600+	\$4000
Truffle Making Class (16+, ticketed \$15 per person), River's Edge CDD 1, 11/9/2023	1800	30 (capped)	\$1800
Murder Mystery Dinner (Ticketed \$25 per person), River's Edge CDD 1	1800	168	\$6037



Event Title & Description (include date of event and community name)	Total # of Households Occupied	# of Participants	Cost
HL: Dive-In Movie (3/10/23); 200 inflatable, extra-large pool noodles, pool slide open during the event, photo booth with LeBron James and Bugs Bunny	1,154	200	\$664.91
HL: Spring Fling (4/15/23, 11am to 2pm) 5,000 Easter Eggs, Easter Bunny on site with toys and candy, 5 golden eggs with gift baskets, three food trucks.	1,154	500	\$4,494.49
HL: Memorial Day (5/29/23, 11am to 2pm) DJ at the pool, lots of Patriotic Décor.	1,154	550	\$1,222.80
HL: 4 th of July (7/4/23, 11am to 2pm) Catered hot dogs and hamburgers, chips and water; DJ music.	1,154	724	\$4,644.61
HL: 80s Neon Pool Party (8/19/23, 6pm to 11pm) DJ playing 80s hits with laser lights, 800 glow sticks, 500 LED beachballs, giveaways, 2 Mr. Softee trucks giving away 500 free cones, pool slide open until 11pm.	1,154	850	\$4,883.24
HL: Haunted House/Two Nights (10/17/23 and 10/18/23) 6pm to 9pm and 5pm to 8pm. Transformed the Heritage Room into a spooky maze of rooms and effects, animatronics, thunder and lightning, smoke machines, projections, and a LOT of candy.	1,154	915	\$2,349.06
HL: Pictures with Santa/Two Nights (12/15/23 and 12/16/23) 3 hours each night. Reservations for pictures with Santa. Photo packages available to residents for purchase or could take their own pictures. 600 double stuffed cookies, hot chocolate, letters to Santa with stamps and North Pole post mark; 500 easy ornament crafts to take home.	1,154	500	\$2,068.41



- *Has the Proposer, or any of its principals or supervisory personnel (e.g., owner, officer, or supervisor, etc.), been terminated from any management contract within the past 3 years? Yes No Please provide the following information:*

Project Name/Location: **WaterSong** (in RiverTown) / Saint Johns, Florida
 Contact: D.J. Smith, Mattamy Homes Contact Phone: (904) 279-9500
 Project Type/Description: Active Adult planned-community of 600+ units at build-out.
 Dollar Amount of Contract: \$90,000
 Scope of Services for Project: Amenity-and-Lifestyle Management; special events.
(Vesta also managed the HOA.)
 Dates Serviced: December, 2021 - July, 2022.
 Reason for Termination: Unsatisfactory work performance by Vesta's assigned staff.

Project Name/Location: **The Bay Club at WestShore Yacht Club** / Tampa, Florida
 Contact: Art Everson Contact Phone: (864) 346-3535
 Project Type/Description: Active Adult planned-community of 400+ units at build-out.
 Dollar Amount of Contract: \$400,000
 Scope of Services for Project: Amenity-and-Lifestyle Management; F & B Operations.
 Dates Serviced: 2012 - April, 2022.
 Reason for Termination: The residents acquired the Club from an affiliated Special Purpose Entity of Vesta, and decided to "self-manage" to try to reduce their expenses.

Project Name/Location: **Aberdeen CDD** / , St. Johns, Florida
 Contact: **Angela Andrews** Contact Phone:
 Project Type/Description: CDD of 1,600+ homes
 Dollar Amount of Contract: \$160,000
 Scope of Services for Project: Amenity and Lifestyle Management; Special Events
 Dates Serviced: December, 2009 - 2021
 Reason for Termination: Client prioritized cost savings, over other factors, during RFP

- *Has the Proposer been cited by OSHA for any job site or company office/shop safety violations in the past five years? Yes No*
- *Has the Proposer experienced any worker injuries resulting in a worker losing more than ten (10) working days as a result of the injury in the past five years? Yes No*
- *Please state whether or not the Proposer or any of its affiliates are presently barred or suspended from bidding or contracting on any state, local, or federal contracts? Yes No*

- *List any and all governmental enforcement actions (e.g., any action taken to impose fines or penalties, licensure issues, permit violations, consent orders, etc.) taken against the Proposer or its principals, or relating to the work of the Proposer or its principals, in the last five (5) years. Please describe the nature of the action, the Proposer's role in the action, and the status and/or resolution of the action.*

None

- *List any and all litigation to which the Proposer or its principals have been a party in the last five (5) years. Please describe the nature of the litigation, the Proposer's role in the litigation, and the status and/or resolution of the litigation.*

- At our "Five Towns" managed community in the St. Petersburg area, a resident alleged a type of "slip-and-fall," supposedly resulting from an insect sting occurring on the club premises/facilities that we maintain. The claim was dismissed.

- A former employee at our Kings Point Sun City Center property alleged wrongful termination in lieu of receiving severance pay (contrary to our standard employment practice.) The claim was dismissed.

- In February of 2019, a "Dram Shop" liability matter was settled by our insurance carrier involving a homicide of a resident by a fellow resident in a managed community of Vesta's in the Tampa area, The Bay Club at Westshore Yacht Club.

- A former Vesta employee alleged age-discrimination as the reason for his or her termination at our Villages of Bloomingdale contact in Riverview. The claim was settled (for a modest sum) out of court on May 21, 2021.

“I appreciate all the activities offered to us! We spend all summer at the pool and 2 of my kids do camp too. . . It's awesome to have all these activities right here in the neighborhood! ”

“I feel that the pool staff and the entire group of individuals that see the day to day operations at the amenities center are doing an excellent job! Thank you!!!”

”

Bartram Springs CDD Residents, taken from the Pool Experience Survey

Bartram Springs Staffing Model

Option #1: Alternate Staffing Model

This model reflects our recommended approach and differs from your current staffing structure in the following ways in order to deliver greater value:

- Increased maintenance tech capability to 2 full-time Techs instead of the current 1.5 to enable us to insource more work to save money over vending out work and to better maintain the facility and grounds as they mature.
- Consolidation of Field Operations Management responsibilities across the General Manager (GM) and Amenity Manager (AM). The GM and AM skills sets and coverage throughout the workdays, evenings and weekends make them well positioned to direct maintenance staff, meet with vendors, do inspections and keep the Board well apprised of repairs and capital work.
- There is no reduction in Amenity Management since the Senior Guest Services Attendant and the Pool Deck Supervisor/Lead Lifeguard hours all remain the same.
- There is a reduction in Guest Service staffing of about 338 hours by going from three seasonal schedules to just two:
 - In Season: Monday 2PM – 9PM, Tuesday – Sunday 9AM – 9PM
 - Off Season: Monday CLOSED, Tuesday – Sunday 9AM – 7PM.
- Adjust our current staffing model for Lifeguards to center on slide activity. We could also provide a reduction in the need for lifeguards on duty by closing the slide after Labor Day instead of staffing through the end of September. We can also work with a model that focuses the guards on the family Recreational Pool only, thus reducing the need from 4 staff members on deck to 3. This saves 1,461 hours and is essentially a decision to go with fewer, more experienced staff than we previously had and best aligns those hours with actual demand. This approach saves money that can be reinvested in other areas of the operation.
- Increased compensation across all positions to better attract and retain staff and pursue more experienced front desk personnel as we continue to adjust wage inflation.
- If paired with “Cost Plus Pricing” (Option #1A) which is also our recommendation, then the following additional benefits can be realized:
 - Provides a net saving of CDD money under what is currently budgeted for the remainder of FY 2024.
 - Increased transparency by sharing our onsite costs through monthly reporting from our third-party payroll vendor and then charging a fixed multiplier to cover onsite non-labor expenses and offsite support expenses as well as profit. Monthly reporting allows the Board to track how expenses compare to budget. Changes can be made as needed through an enhanced partnership between the Board and Vesta if cost reductions are desired or the Board requests additional services.
 - Provides flexibility to increase or decrease scope of service as needed; or to tailor the experience level of onsite team members relative to the District’s budget.

Option #2: Staffing per RFP

This model is submitted as the RFP was written and reflects your current level of staffing. Proposed increases relative to your current budget reflect increases in compensation to retain management and seek front desk and maintenance team members with greater experience and remain competitive to attract and retain talent given inflationary pressures and annualized average Florida minimum wages increases through 2027.

Cost-Plus Pricing Model

We are proposing to bill based on actual cost of wages and benefits (The **Cost**) using reporting from our third party payroll processor (Paycom) and then apply a multiplier (the **Plus**) to cover non-payroll expenses such as onsite non-billable items (smart phones, training, materials, uniforms, etc.), insurance, regional and corporate support and a profit. The multiplier is set at fixed 1.20. So, for every \$1.00 in employee wages and benefits incurred, Vesta charges \$1.20. 83% of every dollar paid to Vesta goes directly to onsite employee compensation and benefits.

Advantages

1. **Creates transparency.** The District knows what compensation flows directly to onsite personnel.
2. This **eliminates the inefficiencies** created by a multi-year fixed rate contract where uncertainty increases over time and vendor's need to increase their margins to offset it resulting in an inevitably winner and loser. If the vendor does not accurately project future labor costs, they can lose money and conversely if the vendor overestimates costs, then they will profit at the expense of the District. Neither scenario is necessarily good for long-term trust and partnership.
3. The **District only pays for what it actually gets.** If a position is gapped, then there are no wages to bill. There is no need to negotiate refunds or adjustments.
4. **Vesta is still accountable to keep the District's on budget** and will estimate annual expenses for our services during the annual budget process.
5. **Hours, levels of services, and/or scope can be easily adjusted** by the Board without any need for reworking the contract to accommodate preferences or in response to economic pressures. This arrangement provides flexibility to tweak costs throughout the year to hit a desired target.
6. When there is a vacancy, **multiple candidates** for a position at different compensation levels can be considered with the District only being billed for costs actually incurred. Someone with less experience could save the District money whereas a more experienced candidate might cost more but provide greater overall value. There is no incentive for the vendor to choose a less expensive option to save against a fixed reimbursement rate.

Wages

- Regular
- Onboarding
- Holiday
- Incentive
- Back Pay
- Overtime
- Vacation O
- Retro Pay
- Fitness CI
- Miscellaneous
- Sick
- Floating Holiday
- Swim Class
- Holiday Work



The image shows a screenshot of a 'Labor Allocation Detail Report' (LADR) from Paycom. The report is a table with multiple columns and rows. Three specific areas are highlighted with colored boxes: a red box on the left side, a blue box in the middle, and a green box on the right side. Lines connect these boxes to their respective lists of items.

Non-Wage Benefits

- Basic ADD
- Basic Life
- Medical Me

Taxes & WC

- FUTA
- Medicare
- Social Sec.
- FL SUI
- Worker's Comp

What is the "Plus"?

The "plus" is a multiplier we use to factor in all other costs not on the Labor Allocation Detail Report (LADR) to ensure we cover all other expenses (noted below) and make a profit. The multiplier will be tailored to each account and vary from contract to contract depending on our costs, size of the account (volume discount), other sources of revenue (programming, café, etc.), etc. The plus multiplier covers everything the contract and or operations require Vesta to pay for that is not billable to the District such as:

- Smart phones
- Training materials
- Vesta logo uniforms
- Computers/tablets/IT not billable
- Offsite employee travel that is not billable
- Liability Insurance
- All costs associated with Regional Support
- All costs associated with Corporate Support
- Our Profit

Process for Cost-Plus Monthly Billing

We will provide Monthly Reporting to compare our actual billing to your budget. • If our onsite, billable labor is less expensive then we estimated as part of your annual budget process, then these realized savings would go to the District (not Vesta.) • If our onsite, billable labor is trending to be more expensive then estimated, we can partner with you regarding ways to reduce staffing costs proactively, to come in on-budget (or as directed by the Board.)

Below is an example of the Monthly Reporting we provide as part of our manager's report for Heritage Landing CDD:

Heritage Landing Actual vs Forecast (Budget) Summary						
FY 2023	Estimated (Budgeted) Fee	Actual Fee	Variance MTD	Cumulative Variance YTD	Comments	% by Month
October	\$31,762	\$29,032	-\$2,730	-\$2,730	Additional maint tech hours not yet staffed. Partial FA Wednesday vacancy. No management increases until 11/1.	7.10%
November	\$31,762	\$28,784	-\$2,978	-\$5,709	Additional maint tech and FA vacancy not filled until mid November.	7.10%
December	\$31,762	\$29,645	-\$2,117	-\$7,826	Wages and Benefits were less than expected.	7.10%
January	\$31,762	\$30,608	-\$1,154	-\$8,980	Wages and Benefits were less than expected.	7.10%
February	\$31,762	\$30,418	-\$1,344	-\$10,325	Wages and Benefits were less than expected.	7.10%
March	\$37,794	\$39,755	\$1,960	-\$8,364	Onboarding 25+ Staff. Lifeguard Training. Added unbudgeted weekend maintenance hours for rest of year.	8.34%
April	\$38,013	\$42,372	\$4,359	-\$4,006	Continued Lifeguard Training. Additional Maintenance Hours added to insource work.	8.39%
May	\$39,646	\$38,491	-\$1,156	-\$5,161	Wages and Benefits were less than expected.	8.75%
June	\$50,679	\$51,065	\$386	-\$4,775	Wages and Benefits were on target. Includes 5/31.	11.22%
July	\$49,758	\$50,294	\$535	-\$4,239	Wages and Benefits were on target.	11.02%
August	\$41,732	\$46,759	\$5,027	\$788	Wages and Benefits were on target.	9.22%
September	\$34,254	\$37,048	\$2,794	\$3,582	Over budget for the FY due to Board decision to add unbudgeted weekend maintenance hours (\$3,483) and insourcing of work (\$2,746) to save money over vending.	7.55%
	\$450,689	\$454,270				100.00%

Pricing Summary

- Our recommendation is highlighted in green below.

Pricing Summary				
Options and Description	Prorated FY2024	FY2025	FY2026	FY2027
Option #1A: Alternate Staffing with Cost Plus	\$355,585	\$563,900	\$593,250	\$619,546
Option #1B: Alternate Staffing with Fixed Rate	\$363,672	\$577,500	\$615,817	\$654,955
Potential Annual Savings w/ Cost Plus	\$8,087	\$13,600	\$22,567	\$35,409
Option #2A: Per RFP with Cost Plus	\$387,253	\$656,987	\$690,605	\$721,739
Option #2B: Per RFP with Fixed Rate	\$399,431	\$678,486	\$723,064	\$769,401
Potential Savings w/ Cost Plus	\$12,178	\$21,499	\$32,459	\$47,662
*Current FY2024 Contract Budget is \$531,371				
**Does not included revenue share from programming of \$40,727.00 which effectively offsets the cost.				
% Annual Change in Pricing Summary**				
Options and Description	FY2024*	FY2025	FY2026	FY2027
Option #1A: Alternate Staffing with Cost Plus	-0.66%	6.03%	5.20%	4.43%
Option #1B: Alternate Staffing with Fixed Rate	1.60%	6.17%	6.64%	6.36%
Option #2A: Per RFP with Cost Plus	14.96%	6.75%	5.12%	4.51%
Option #2B: Per RFP with Fixed Rate	18.58%	6.88%	6.57%	6.41%
*Annualized compared to current budget of \$531,371				
**Annual increases are heavily influenced by the yearly increases in FL minimum wage averaging 10% thru 2027				

Pricing Options

Option #1A Alternate Staffing Proposal w/ Cost Plus (March 1, 2024-September 30, 2024)						
Position	Annual Hours*	Hourly or Salaried Wage (1)	Prorated Hours for 3/1-9/30	Prorated Total Gross Wages (2)	Prorated Total Direct Employee Burden	Prorated Total Fee to CDD (4)
General Manager	2,080	\$78,000.00	1,216	\$45,607	\$60,415	
Facility Manager/Lifestyle Dir	2,080	\$60,000.00	1,216	\$35,082	\$44,416	
Sr Guest Services Attendant	1,144	\$16.00	669	\$10,702	\$12,199	
Guest Services Attendant	3,215	\$15.00	1,359	\$20,385	\$23,235	
Fitness Center Monitor	1,456	\$15.00	856	\$12,840	\$24,893	
Sr. Maintenance Tech	2,080	\$23.00	1,216	\$27,972	\$39,436	
Maintenance Tech	2,080	\$19.00	1,216	\$23,107	\$33,648	
Lead Lifeguard***	612	\$19.00	612	\$11,628	\$13,254	
Lifeguards***	3,162	\$14.00	3,162	\$44,268	\$50,457	
Event Attendant	60	\$15.00	25	\$375	\$427	
Totals	NA	NA	NA	\$231,966	\$302,380	\$355,585

*The noted hours are for an entire year. Please prorate for the months of March through September 2024 (58.47% of year).
 ** Does not include cost of onsite team's lap tops, mobile phones, uniforms, training, certifications, insurance or any support (regional and
 *** No prorating impact to season

Option #1B Alternate Staffing Proposal w/ Fixed Rate (March 1, 2024-September 30, 2024)						
Position	Annual Hours*	Hourly or Salaried Wage (1)	Prorated Hours for 3/1-9/30	Prorated Total Gross Wages (2)	Prorated Total Direct Employee Burden	Prorated Total Fee to CDD (4)
General Manager	2,080	\$78,000.00	1,216	\$45,607	\$60,415	
Facility Manager/Lifestyle Dir	2,080	\$60,000.00	1,216	\$35,082	\$44,416	
Sr Guest Services Attendant	1,144	\$16.00	669	\$10,702	\$12,199	
Guest Services Attendant	3,215	\$15.00	1,359	\$20,385	\$23,235	
Fitness Center Monitor	1,456	\$15.00	856	\$12,840	\$24,893	
Sr. Maintenance Tech	2,080	\$23.00	1,216	\$27,972	\$39,436	
Maintenance Tech	2,080	\$19.00	1,216	\$23,107	\$33,648	
Lead Lifeguard***	612	\$19.00	612	\$11,628	\$13,254	
Lifeguards***	3,162	\$14.00	3,162	\$44,268	\$50,457	
Event Attendant	60	\$15.00	\$25.00	\$375	\$427	
Totals	NA	NA	NA	\$231,966	\$302,380	\$363,672

*The noted hours are for an entire year. Please prorate for the months of March through September 2024 (58.47% of year).
 ** Does not include cost of onsite team's lap tops, mobile phones, uniforms, training, certifications, insurance or any support (regional and
 *** No prorating impact to season

Option #2A Per RFP w/ Cost Plus (March 1, 2024-September 30, 2024)						
Position	Annual Hours*	Hourly or Salaried Wage (1)	Prorated Hours for 3/1-9/30	Prorated Total Gross Wages (2)	Prorated Total Direct Employee Burden	Prorated Total Fee to CDD (4)
General Manager	2,080	\$75,000.00	1,216	\$43,852	\$58,328	
Facility Manager/Lifestyle Dir	2,080	\$60,000.00	1,216	\$35,082	\$44,416	
Field Operations Manager	2,080	\$66,177.50	1,216	\$38,694	\$52,191	
Sr Guest Services Attendant	1,144	\$16.00	669	\$10,702	\$12,199	
Guest Services Attendant	3,553	\$15.00	1,502	\$22,530	\$25,680	
Fitness Center Monitor	1,456	\$15.00	856	\$12,840	\$14,635	
Sr. Maintenance Tech	2,080	\$21.55	1,216	\$26,209	\$34,781	
Maintenance Tech	1,040	\$18.50	608	\$11,250	\$12,822	
Lead Lifeguard***	612	\$19.00	612	\$11,628	\$13,354	
Lifeguards***	4,623	\$14.00	4,623	\$64,722	\$73,770	
Event Attendant	60	\$15.00	25	\$375	\$427	
Totals	NA	NA	NA	\$277,884	\$342,605	\$387,253

*The noted hours are for an entire year. Please prorate for the months of March through September 2024 (58.47% of year).
 ** Does not include cost of onsite team's lap tops, mobile phones, uniforms, training, certifications, insurance or any support (regional and
 *** No prorating impact to season

Option #2B Per RFP w/ Fixed Rate (March 1, 2024-September 30, 2024)						
Position	Annual Hours*	Hourly or Salaried Wage (1)	Prorated Hours for 3/1-9/30	Prorated Total Gross Wages (2)	Prorated Total Direct Employee Burden	Prorated Total Fee to CDD (4)
General Manager	2,080	\$75,000.00	1,216	\$43,852	\$58,328	
Facility Manager/Lifestyle Dir	2,080	\$60,000.00	1,216	\$35,082	\$44,416	
Field Operations Manager	2,080	\$66,177.50	1,216	\$38,694	\$52,191	
Sr Guest Services Attendant	1,144	\$16.00	669	\$10,702	\$12,199	
Guest Services Attendant	3,553	\$15.00	1,502	\$22,530	\$25,680	
Fitness Center Monitor	1,456	\$15.00	856	\$12,840	\$14,635	
Sr. Maintenance Tech	2,080	\$21.55	1,216	\$26,209	\$34,781	
Maintenance Tech	1,040	\$18.50	608	\$11,250	\$12,822	
Lead Lifeguard***	612	\$19.00	612	\$11,628	\$13,354	
Lifeguards***	4,623	\$14.00	4,623	\$64,722	\$73,770	
Event Attendant	60	\$15.00	25	\$375	\$427	
Totals	NA	NA	NA	\$277,884	\$342,605	\$399,431

*The noted hours are for an entire year. Please prorate for the months of March through September 2024 (58.47% of year).
 ** Does not include cost of onsite team's lap tops, mobile phones, uniforms, training, certifications, insurance or any support (regional and
 *** No prorating impact to season

Option #1A Alternate Staffing Proposal w/ Cost Plus (FY 2025)					
Position	Annual Hours	Hourly or Salaried Wage (1)	Total Gross Wages (2)	Total Direct Employee Burden (3)*	Total Fee to CDD (4)
General Manager	2,080	\$78,000.00	\$78,000	\$99,261	
Facility Manager/Lifestyle Dir	2,080	\$62,750.00	\$62,750	\$75,170	
Sr Guest Services Attendant	1,144	\$17.12	\$19,585	\$22,153	
Guest Services Attendant	3,215	\$16.05	\$51,601	\$58,366	
Fitness Center Monitor	1,456	\$16.05	\$23,369	\$26,636	
Sr. Maintenance Tech	2,080	\$24.15	\$50,232	\$66,226	
Maintenance Tech	2,080	\$19.95	\$41,496	\$55,833	
Lead Lifeguard	612	\$20.33	\$12,442	\$14,181	
Lifeguards	3,162	\$14.98	\$47,367	\$53,989	
Event Attendant	60	\$16.05	\$963	\$1,098	
Totals	NA	NA	\$387,805	\$472,912	\$563,900

* Does not include cost of onsite team's lap tops, mobile phones, uniforms, training, certifications, insurance or any support (regional and corporate).

Option #1B Alternate Staffing Proposal w/ Fixed Rate (FY 2025)					
Position	Annual Hours	Hourly or Salaried Wage (1)	Total Gross Wages (2)	Total Direct Employee Burden (3)*	Total Fee to CDD (4)
General Manager	2,080	\$78,000.00	\$78,000	\$99,261	
Facility Manager/Lifestyle Dir	2,080	\$62,750.00	\$62,750	\$75,170	
Sr Guest Services Attendant	1,144	\$17.12	\$19,585	\$22,153	
Guest Services Attendant	3,215	\$16.05	\$51,601	\$58,366	
Fitness Center Monitor	1,456	\$16.05	\$23,369	\$26,636	
Sr. Maintenance Tech	2,080	\$24.15	\$50,232	\$66,226	
Maintenance Tech	2,080	\$19.95	\$41,496	\$55,833	
Lead Lifeguard	612	\$20.33	\$12,442	\$14,181	
Lifeguards	3,162	\$14.98	\$47,367	\$53,989	
Event Attendant	60	\$16.05	\$963	\$1,098	
Totals	NA	NA	\$387,805	\$472,912	\$577,500

* Does not include cost of onsite team's lap tops, mobile phones, uniforms, training, certifications, insurance or any support (regional and corporate).

Option #2A Per RFP w/ Cost Plus (FY 2025)					
Position	Annual Hours	Hourly or Salaried Wage (1)	Total Gross Wages (2)	Total Direct Employee Burden (3)*	Total Fee to CDD (4)
General Manager	2,080	\$78,000.00	\$78,000	\$99,261	
Facility Manager/Lifestyle Dir	2,080	\$62,750.00	\$62,750	\$75,170	
Field Operations Manager	2,080	\$68,824.60	\$68,825	\$87,671	
Sr Guest Services Attendant	1,144	\$17.12	\$19,585	\$22,153	
Guest Services Attendant	3,553	\$16.05	\$51,601	\$58,366	
Fitness Center Monitor	1,456	\$16.05	\$23,369	\$26,636	
Sr. Maintenance Tech	2,080	\$24.15	\$50,232	\$66,226	
Maintenance Tech	1,040	\$19.95	\$41,496	\$55,833	
Lead Lifeguard	612	\$20.33	\$12,442	\$14,181	
Lifeguards	4,623	\$14.98	\$47,367	\$53,989	
Event Attendant	60	\$16.05	\$963	\$1,098	
Totals	NA	NA	\$456,629	\$560,583	\$656,987

* Does not include cost of onsite team's lap tops, mobile phones, uniforms, training, certifications, insurance or any support (regional and corporate).

Option #2B Per RFP w/ Fixed Rate (FY 2025)					
Position	Annual Hours	Hourly or Salaried Wage (1)	Total Gross Wages (2)	Total Direct Employee Burden (3)*	Total Fee to CDD (4)
General Manager	2,080	\$78,000.00	\$78,000	\$99,261	
Facility Manager/Lifestyle Dir	2,080	\$62,750.00	\$62,750	\$75,170	
Field Operations Manager	2,080	\$68,824.60	\$68,825	\$87,671	
Sr Guest Services Attendant	1,144	\$17.12	\$19,585	\$22,153	
Guest Services Attendant	3,553	\$16.05	\$51,601	\$58,366	
Fitness Center Monitor	1,456	\$16.05	\$23,369	\$26,636	
Sr. Maintenance Tech	2,080	\$24.15	\$50,232	\$66,226	
Maintenance Tech	1,040	\$19.95	\$41,496	\$55,833	
Lead Lifeguard	612	\$20.33	\$12,442	\$14,181	
Lifeguards	4,623	\$14.98	\$47,367	\$53,989	
Event Attendant	60	\$16.05	\$963	\$1,098	
Totals	NA	NA	\$456,629	\$560,583	\$678,486

* Does not include cost of onsite team's lap tops, mobile phones, uniforms, training, certifications, insurance or any support (regional and corporate).

Option #1A Alternate Staffing Proposal w/ Cost Plus (FY 2026)					
Position	Annual Hours	Hourly or Salaried Wage (1)	Total Gross Wages (2)	Total Direct Employee Burden (3)*	Total Fee to CDD (4)
General Manager	2,080	\$81,120.00	\$81,120	\$103,296	
Facility Manager/Lifestyle Dir	2,080	\$65,637.50	\$65,638	\$78,929	
Sr Guest Services Attendant	1,144	\$18.32	\$20,956	\$23,886	
Guest Services Attendant	3,215	\$17.01	\$54,697	\$62,343	
Fitness Center Monitor	1,456	\$17.01	\$24,771	\$28,234	
Sr. Maintenance Tech	2,080	\$25.36	\$52,744	\$69,537	
Maintenance Tech	2,080	\$20.75	\$43,156	\$58,131	
Lead Lifeguard	612	\$21.35	\$13,064	\$14,890	
Lifeguards	3,162	\$16.03	\$50,682	\$57,768	
Event Attendant	60	\$17.01	\$1,021	\$1,163	
Totals	NA	NA	\$407,848	\$498,178	\$593,250

* Does not include cost of onsite team's lap tops, mobile phones, uniforms, training, certifications, insurance or any support (regional and corporate).

Option #1B Alternate Staffing Proposal w/ Fixed Rate (FY 2026)					
Position	Annual Hours	Hourly or Salaried Wage (1)	Total Gross Wages (2)	Total Direct Employee Burden (3)*	Total Fee to CDD (4)
General Manager	2,080	\$81,120.00	\$81,120	\$103,296	
Facility Manager/Lifestyle Dir	2,080	\$65,637.50	\$65,638	\$78,929	
Sr Guest Services Attendant	1,144	\$18.32	\$20,956	\$23,886	
Guest Services Attendant	3,215	\$17.01	\$54,697	\$62,343	
Fitness Center Monitor	1,456	\$17.01	\$24,771	\$28,234	
Sr. Maintenance Tech	2,080	\$25.36	\$52,744	\$69,537	
Maintenance Tech	2,080	\$20.75	\$43,156	\$58,131	
Lead Lifeguard	612	\$21.35	\$13,064	\$14,890	
Lifeguards	3,162	\$16.03	\$50,682	\$57,768	
Event Attendant	60	\$17.01	\$1,021	\$1,163	
Totals	NA	NA	\$407,848	\$498,178	\$615,817

* Does not include cost of onsite team's lap tops, mobile phones, uniforms, training, certifications, insurance or any support (regional and corporate).

Option #2A Per RFP w/ Cost Plus (FY 2026)					
Position	Annual Hours	Hourly or Salaried Wage (1)	Total Gross Wages (2)	Total Direct Employee Burden (3)*	Total Fee to CDD (4)
General Manager	2,080	\$81,120.00	\$81,120	\$103,296	
Facility Manager/Lifestyle Dir	2,080	\$65,637.50	\$65,638	\$78,929	
Field Operations Manager	2,080	\$71,577.58	\$71,578	\$91,242	
Sr Guest Services Attendant	1,144	\$18.32	\$20,956	\$23,886	
Guest Services Attendant	3,553	\$17.01	\$54,697	\$62,343	
Fitness Center Monitor	1,456	\$17.01	\$24,771	\$28,234	
Sr. Maintenance Tech	2,080	\$25.36	\$52,744	\$69,537	
Maintenance Tech	1,040	\$20.75	\$43,156	\$58,131	
Lead Lifeguard	612	\$21.35	\$13,064	\$14,890	
Lifeguards	4,623	\$16.03	\$50,682	\$57,768	
Event Attendant	60	\$17.01	\$1,021	\$1,163	
Totals	NA	NA	\$479,426	\$589,420	\$690,605

* Does not include cost of onsite team's lap tops, mobile phones, uniforms, training, certifications, insurance or any support (regional and corporate).

Option #2B Per RFP w/ Fixed Rate (FY 2026)					
Position	Annual Hours	Hourly or Salaried Wage (1)	Total Gross Wages (2)	Total Direct Employee Burden (3)*	Total Fee to CDD (4)
General Manager	2,080	\$81,120.00	\$81,120	\$103,296	
Facility Manager/Lifestyle Dir	2,080	\$65,637.50	\$65,638	\$78,929	
Field Operations Manager	2,080	\$71,577.58	\$71,578	\$91,242	
Sr Guest Services Attendant	1,144	\$18.32	\$20,956	\$23,886	
Guest Services Attendant	3,553	\$17.01	\$54,697	\$62,343	
Fitness Center Monitor	1,456	\$17.01	\$24,771	\$28,234	
Sr. Maintenance Tech	2,080	\$25.36	\$52,744	\$69,537	
Maintenance Tech	1,040	\$20.75	\$43,156	\$58,131	
Lead Lifeguard	612	\$21.35	\$13,064	\$14,890	
Lifeguards	4,623	\$16.03	\$50,682	\$57,768	
Event Attendant	60	\$17.01	\$1,021	\$1,163	
Totals	NA	NA	\$479,426	\$589,420	\$723,064

* Does not include cost of onsite team's lap tops, mobile phones, uniforms, training, certifications, insurance or any support (regional and corporate).

Option #1A Alternate Staffing Proposal w/ Cost Plus (FY 2027)

Position	Annual Hours	Hourly or Salaried Wage (1)	Total Gross Wages (2)	Total Direct Employee Burden (3)*	Total Fee to CDD (4)
General Manager	2,080	\$84,364.80	\$84,365	\$107,496	
Facility Manager/Lifestyle Dir	2,080	\$68,063.00	\$68,063	\$82,154	
Sr Guest Services Attendant	1,144	\$19.23	\$22,004	\$25,080	
Guest Services Attendant	3,215	\$17.86	\$57,432	\$65,461	
Fitness Center Monitor	1,456	\$17.86	\$26,009	\$29,646	
Sr. Maintenance Tech	2,080	\$26.37	\$54,853	\$72,387	
Maintenance Tech	2,080	\$21.58	\$44,882	\$60,524	
Lead Lifeguard	612	\$22.41	\$13,717	\$15,635	
Lifeguards	3,162	\$16.83	\$53,217	\$60,656	
Event Attendant	60	\$17.86	\$1,072	\$1,222	
Totals	NA	NA	\$425,614	\$520,260	\$619,546

* Does not include cost of onsite team's lap tops, mobile phones, uniforms, training, certifications, insurance or any support (regional and corporate).

Option #1B Alternate Staffing Proposal w/ Fixed Rate (FY 2027)

Position	Annual Hours	Hourly or Salaried Wage (1)	Total Gross Wages (2)	Total Direct Employee Burden (3)*	Total Fee to CDD (4)
General Manager	2,080	\$84,364.80	\$84,365	\$107,496	
Facility Manager/Lifestyle Dir	2,080	\$68,063.00	\$68,063	\$82,154	
Sr Guest Services Attendant	1,144	\$19.23	\$22,004	\$25,080	
Guest Services Attendant	3,215	\$17.86	\$57,432	\$65,461	
Fitness Center Monitor	1,456	\$17.86	\$26,009	\$29,646	
Sr. Maintenance Tech	2,080	\$26.37	\$54,853	\$72,387	
Maintenance Tech	2,080	\$21.58	\$44,882	\$60,524	
Lead Lifeguard	612	\$22.41	\$13,717	\$15,635	
Lifeguards	3,162	\$16.83	\$53,217	\$60,656	
Event Attendant	60	\$17.86	\$1,072	\$1,222	
Totals	NA	NA	\$425,614	\$520,260	\$654,955

* Does not include cost of onsite team's lap tops, mobile phones, uniforms, training, certifications, insurance or any support (regional and corporate).

Option #2A Per RFP w/ Cost Plus (FY 2027)

Position	Annual Hours	Hourly or Salaried Wage (1)	Total Gross Wages (2)	Total Direct Employee Burden (3)*	Total Fee to CDD (4)
General Manager	2,080	\$84,364.80	\$84,365	\$107,496	
Facility Manager/Lifestyle Dir	2,080	\$68,063.00	\$68,063	\$82,154	
Field Operations Manager	2,080	\$74,440.69	\$74,441	\$94,959	
Sr Guest Services Attendant	1,144	\$19.23	\$22,004	\$25,080	
Guest Services Attendant	3,553	\$17.86	\$57,432	\$65,461	
Fitness Center Monitor	1,456	\$17.86	\$26,009	\$29,646	
Sr. Maintenance Tech	2,080	\$26.37	\$54,853	\$72,387	
Maintenance Tech	1,040	\$21.58	\$44,882	\$60,524	
Lead Lifeguard	612	\$22.41	\$13,717	\$15,635	
Lifeguards	4,623	\$16.83	\$53,217	\$60,656	
Event Attendant	60	\$17.86	\$1,072	\$1,222	
Totals	NA	NA	\$500,055	\$615,218	\$721,739

* Does not include cost of onsite team's lap tops, mobile phones, uniforms, training, certifications, insurance or any support (regional and corporate).

Option #2B Per RFP w/ Fixed Rate (FY 2027)

Position	Annual Hours	Hourly or Salaried Wage (1)	Total Gross Wages (2)	Total Direct Employee Burden (3)*	Total Fee to CDD (4)
General Manager	2,080	\$84,364.80	\$84,365	\$107,496	
Facility Manager/Lifestyle Dir	2,080	\$68,063.00	\$68,063	\$82,154	
Field Operations Manager	2,080	\$74,440.69	\$74,441	\$94,959	
Sr Guest Services Attendant	1,144	\$19.23	\$22,004	\$25,080	
Guest Services Attendant	3,553	\$17.86	\$57,432	\$65,461	
Fitness Center Monitor	1,456	\$17.86	\$26,009	\$29,646	
Sr. Maintenance Tech	2,080	\$26.37	\$54,853	\$72,387	
Maintenance Tech	1,040	\$21.58	\$44,882	\$60,524	
Lead Lifeguard	612	\$22.41	\$13,717	\$15,635	
Lifeguards	4,623	\$16.83	\$53,217	\$60,656	
Event Attendant	60	\$17.86	\$1,072	\$1,222	
Totals	NA	NA	\$500,055	\$615,218	\$769,401

* Does not include cost of onsite team's lap tops, mobile phones, uniforms, training, certifications, insurance or any support (regional and corporate).

Event Planning and Program Revenue

Event Planning: Please detail your vision for events that you plan to provide at Bartram Springs during the first year of the contract utilizing an annual budget of \$21,000 (inclusive of all event costs).

Event Title & Description	Estimated # of Participants	Estimated Cost
Kids Triathlon: partnered with Florida Race Day (10/15/2023)		\$252
October Movie on the Lawn (10/20/2023)	45	\$368.97
Fall Festival (10/21/2023)	350	\$6,127
Trunk or Treat (10/28/2023)	150	\$621
Ornament Decorating (11/10/2023)	80	\$140.29
November Movie on the Lawn (11/17/2023)	45	\$373.75
Kids Activity Night (11/18/2023)	30	
Letter from Santa (12/8/2023)	175	\$55
Kids Holiday Party (Activity Day) (12/9/2023)	30	
December Movie on the Lawn (12/15/2023)	50	\$373.98
Sundaes with Santa (12/17/2023)	300	\$2,000
Tennis Social (1/15/2024)	20	\$10
Pickleball Social (1/20/2024)	20	\$10
Penguin Plunge (1/27/2024)	100	\$340
Kids Activity Night (2/10/2024)	30	
Family 5K: Partnered with Florida Race Day (2/11/2024)	100	\$112
February Movie on the Lawn (2/16/2024)	45	\$375
Pickleball Clinic (3/9/2024)	16	\$120
Tennis Clinic (3/16/2024)	16	\$100
Spring Fling (3/30/2024)	350	\$6,200
April Movie on the Lawn (4/19/2024)	45	\$375
Community Garage Sale (4/20/2024)	55	\$0
Kids Activity Night (5/4/2024)	30	
Mother's Day Event (5/11/2024)	25	\$600
Memorial Day Kick-Off (5/24/2024)	75	\$800
Father's Day Event (6/15/2024)	20	\$600
June Movie on the Lawn (6/21/2024)	50	\$375
4 th of July Celebration (7/4/2024)	75	\$800
July Movie on the Lawn (7/19/2024)	50	\$375
August Movie on the Lawn (8/16/2024)	45	\$375
Kids Activity Night (8/24/2024)	30	
Labor Day Celebration (9/2/2024)	75	\$500
Community Garage Sale (9/14/2024)	55	0
Total:		\$21,758.02

See next page for previous year's events.

2022/2023 Bartram Springs CDD Events

Event Title & Description (include which month event proposed to take place)	Estimated # of Participants	Estimated Cost
Kids Triathlon: partnered with Florida Race Day (10/2/2022)	80	\$220
October Movie on the Lawn (10/21/2022)	45	\$359.96
Fall Festival (10/22/2022)	350	\$5,754.71
Trunk or Treat (10/29/2022)	200	\$717.09
Chili Cookoff/Cornhole Tournament CANCELLED (11/12/2022)	0	\$0
Ornament Decorating (11/15/2022)	40	\$140.29
November Movie on the Lawn (11/18/2022)	45	\$350
Kids Activity Night (11/19/2022)	25	
Letter from Santa (12/9/2022)	130	\$39.96
December Movie on the Lawn (12/16/2022)	50	\$362.99
Cookie with Santa (12/18/2022)	300	\$1,896.82
Tennis Social (1/14/2023)	15	\$22.97
January Movie on the Lawn (1/20/2023)	45	\$365.99
Penguin Plunge (1/28/2023)	50	\$401.83
Pickleball Clinic (2/4/2023)	13	\$100
Kids Activity Night (2/11/2023)	25	
Family 5K: Partnered with Florida Race Day (2/12/2023)	70	\$20.96
February Movie on the Lawn CANCELLED (2/17/2023)	0	\$14.98
Pickleball Social (3/11/2023)	16	\$30
March Movie on the Lawn (3/17/2023)	16	\$100
Tennis Social (3/25/2023)	12	\$30
Spring Fling (4/8/2023)	350	\$5,658
April Movie on the Lawn (4/21/2023)	50	\$359
Community Garage Sale (4/22/2023)	55	\$0
Mother's Day Event (5/6/2023)	20	1,262
Kids Activity Night (5/13/2023)	25	
Memorial Day Kick-Off (5/26/2023)	50	\$593.67
June Movie on the Lawn (6/16/2023)	50	\$364
Father's Day Event (6/17/2023)	10	\$855
4 th of July Celebration (7/4/2023)	75	\$1158
July Movie on the Lawn (7/21/2023)	50	\$359
August Movie on the Lawn (8/18/2023)	45	\$359
Kids Activity Night (8/26/2023)	30	
Labor Day Celebration (9/4/2023)	100	\$400
Community Garage Sale (9/15/2023)	55	0
Event Staffing		\$1,220
Total:		\$24,539.28

- *Programs & CDD Revenue Share: Please describe all fee-based programming (athletics, fitness classes, camps, lessons, etc.) that you plan to provide at Bartram Springs during the first year of the contract and proposed revenue share (%) with the CDD and estimated total annualized \$.*

**3rd Party Programming – Contracted Directly with the District based on a 10% revenue share
Estimated based on 2023 Programming**

	2024								
	Micki Fitness	Personal Training	Tennis	Derri Fitness	KatDance	Soccer Shots	Swim Lessons	Adult Swim	TOTALS
Month									
Jan	\$ 181.00	\$ 114.00	\$ 250.00	\$ -	\$ -	\$ 178.60	\$ -	\$ -	\$ 723.60
Feb	\$ 117.00	\$ 60.00	\$ 240.00	\$ 2.10	\$ -	\$ -	\$ -	\$ -	\$ 419.10
Mar	\$ 109.00	\$ 150.00	\$ 260.00	\$ 17.85	\$ 207.90	\$ -	\$ -	\$ -	\$ 744.75
Ap	\$ 147.90	\$ 136.50	\$ 250.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 534.40
May	\$ 150.00	\$ 211.50	\$ 250.00	\$ -	\$ 159.20	\$ 852.06	\$ 413.60	\$ -	\$ 2,036.36
June	\$ 123.75	\$ 133.20	\$ 240.00	\$ 9.40	\$ -	\$ -	\$ 1,367.00	\$ -	\$ 1,873.35
July	\$ 147.45	\$ 87.00	\$ 200.00	\$ -	\$ -	\$ -	\$ 1,480.00	\$ 200.00	\$ 2,114.45
Aug	\$ 76.20	\$ 120.00	\$ 210.00	\$ -	\$ 242.00	\$ -	\$ 1,742.00	\$ -	\$ 2,390.20
Sept	\$ 54.00	\$ 104.55	\$ 200.00	\$ -	\$ -	\$ 235.50	\$ 931.00	\$ -	\$ 1,525.05
Oct	\$ 89.70	\$ 150.00	\$ 200.00	\$ -	\$ 268.00	\$ -	\$ 503.00	\$ -	\$ 1,210.70
Nov	\$ 102.90	\$ 150.00	\$ -	\$ -	\$ 248.50	\$ -	\$ -	\$ -	\$ 501.40
Dec	\$ 57.15	\$ 72.00	\$ -	\$ -	\$ 50.00	\$ 554.50	\$ -	\$ -	\$ 733.65
Totals	\$ 1,356.05	\$ 1,488.75	\$ 2,300.00	\$ 29.35	\$ 1,175.60	\$ 1,820.66	\$ 6,436.60	\$ 200.00	\$ 14,807.01

Estimated Revenue for Vesta In House Programs: Summer Camp and Amenity Athletics 2024

- Summer Camp – 10% of Gross
 - **2024 – Gross: \$79,200 CDD % – \$7920.00**
- Amenity Athletics – 10% of Gross Plus \$10.00 per Non-Resident
 - **2024 – Gross: \$95,000.00 CDD % – \$18,000.00**

Estimated 2024 Total Program Revenue Share – \$40,727.01

- *Program References: Provide examples of programs that your firm is currently providing to other similar sized communities (what have you done elsewhere).*
 - **See previous answer on Page**
- *Event References: Please provide examples of events conducted at other similar sized communities.*
 - **See previous answer on Page**



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/YY/YYY)
01/10/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

If this certificate is being prepared for a party who has an insurable interest in the property, do not use this form. Use ACORD 27 or ACORD 28.

PRODUCER Associations Insurance Agency, Inc. 5401 North Central Expressway, Suite 315 Dallas, TX 75205	CONTACT NAME: Associations Insurance Agency, Inc. PHONE: (866) 384-8579 FAX: (214) 751-2390 E-MAIL ADDRESS: Info@AssociationsInsuranceAgency.com PRODUCER CUSTOMER ID: 00003921	
	INSURER(S) AFFORDING COVERAGE NAIC #	
INSURED Vesta Property Services, Inc. 245 Riverside Ave, Suite 300 Jacksonville, 32202	INSURER A: Federal Insurance Company	
	INSURER B: AIG Specialty Insurance Company	
	INSURER C: Beazley Insurance Company, Inc.	
	INSURER D:	
	INSURER E:	
	INSURER F:	

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

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

INSR LTR	TYPE OF INSURANCE	ADOL BMSD	SURR WVD	POLICY NUMBER	POLICY EFF DATE (MM/DD/YYYY)	POLICY EXP DATE (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COM/POP AGG \$ \$ \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION						EACH OCCURRENCE \$ AGGREGATE \$ \$ \$
	WORKERS COMPENSATION AND EMPLOYERS LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	N/A					<input type="checkbox"/> PER <input type="checkbox"/> OTH- STATUTE ER \$ E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A-C	Various			Various	08/01/2023	08/01/2024	See Page 2 for Policy Limits & Deductibles

SPECIAL CONDITIONS / OTHER COVERAGES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

CERTIFICATE HOLDER Insurance Verification	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE Dana Hodge
---	--

ACORD 25 (2009/09)

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“ I have had the pleasure of collaborating with Vesta throughout my 14-year tenure on the Bartram Springs CDD Board with the last six as Chair, and I cannot tell you how refreshing it was to work with an organization that supported the board's mission so well. The true test of a great company and staff is not how they manage the easy tasks but how they handle the hard tasks, problems or issues. Vesta does an incredible job. I give my highest recommendation to Vesta Property Services.

E. Kevin Colcord, past Board Chairman, current Bartram Springs CDD Resident





CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/YYYY) **01/10/2024**

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

If this certificate is being prepared for a party who has an insurable interest in the property, do not use this form. Use ACORD 27 or ACORD 28.

PRODUCER Associations Insurance Agency, Inc. 5401 North Central Expressway, Suite 315 Dallas, TX 75205		CONTACT NAME: Associations Insurance Agency, Inc. PHONE: (866) 384-8579 FAX: (214) 751-2390 E-MAIL ADDRESS: CertificateRequest@AssociationsInsuranceAgency.com PRODUCER CUSTOMER ID: 00003921	
INSURED Vesta Property Services, Inc. 245 Riverside Ave, Suite 300 Jacksonville, 32202		INSURER(S) AFFORDING COVERAGE	NAIC #
		INSURER A: Ategrity Specialty Insurance Company	
		INSURER B: Axis Specialty	
		INSURER C:	
		INSURER D:	

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

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF DATE (MM/DD/YYYY)	POLICY EXP DATE (MM/DD/YYYY)	LIMITS	
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR			01-B-GI-P00000595-4	08/01/2023	08/01/2024	EACH OCCURRENCE	\$ 1,000,000
	<input checked="" type="checkbox"/> SEVERABILITY OF INTEREST GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:						DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 500,000
	<input type="checkbox"/> AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS						COMBINED SINGLE LIMIT (Ea accident)	\$
B-D	<input type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$			Various <small>see Attached</small>	08/01/2023	08/01/2024	EACH OCCURRENCE	\$ 5,000,000
	WORKERS COMPENSATION AND EMPLOYERS LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	N/A					<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER	\$
	Directors & Officers						E.L. EACH ACCIDENT	\$
							E.L. DISEASE - EA EMPLOYEE	\$
							E.L. DISEASE - POLICY LIMIT	\$
							LIMIT	\$
							DEDUCTIBLE	\$

SPECIAL CONDITIONS / OTHER COVERAGES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

CERTIFICATE HOLDER	CANCELLATION
<ul style="list-style-type: none"> Insurance Verification 	<p>SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.</p> <p>AUTHORIZED REPRESENTATIVE</p> <p><i>Dana Hodge</i> Dana Hodge</p>

ACORD 25 (2009/09)

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“ The Fall Fest has so much fun stuff to do with the big climber, pumpkin painting, etc. I love that someone monitors each spot, especially the bounce house and climber, so that everyone gets a turn without too many kids. It's very well organized. There are a lot more events offered overall than in the past.



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IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer any rights to the certificate holder in lieu of such endorsement(s).


PRODUCER USI Southwest 9811 Katy Freeway, Suite 500 Houston, TX 77024 713 490-4600	CONTACT NAME: Brian Phan
	PHONE (A/C, No, Ext): 713-490-4600 FAX (A/C, No): 713-490-4700 E-MAIL: Brian.Phan@usi.com ADDRESS: Brian.Phan@usi.com
INSURED Vesta Property Services, Inc. 245 Riverside Avenue, Suite 300 Jacksonville, FL 32202	INSURER(S) AFFORDING COVERAGE INSURER A: Sentry Insurance Company NAIC # 24988
	INSURER B: Sentry Casualty Company NAIC # 28460
	INSURER C:
	INSURER D:
	INSURER E:
	INSURER F:

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

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INSR LTR	TYPE OF INSURANCE	ADDL INSR	WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (EA occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMPROP AGG \$
A	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> Drive Oth Car <input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> EXCESS LIAB DED. RETENTION \$			9017993003	08/01/2023	08/01/2024	COMBINED SINGLE LIMIT (Per accident) \$ 5,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	<input type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS ONLY <input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS-MADE						EACH OCCURRENCE \$ AGGREGATE \$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
 The Automobile policy includes a Blanket Automatic Additional Insured endorsement that provides additional insured status to the certificate holder only when there is a written contract between the named insured and certificate holder that requires such status. The Automobile Liability policy also contains a special endorsement with Primary and Non-Contributory wording, as required by written contract.
 (See Attached Descriptions)

CERTIFICATE HOLDER For Informational Purposes Only	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 
---	---

“ My wife and I just passed our 5 year anniversary as residents of Bartram Springs, and I'd like to share several thoughts regarding the Amenity Center's pool...I've been a steady user of this most excellent facility ever since we moved in, one of the very few who swims year-round...I've commented a number of times in the past on the superb condition of the pool area and especially how the water is kept by your maintenance crew. This is very much appreciated as it continues in that way to this day... Please feel free to share our thoughts with other members of the CDD leadership to ensure my message gets widest dissemination. ”
 Tom and Amy Heffernan, Bartram Springs Residents



Vesta

Contact Us

245 Riverside Ave. #300
Jacksonville, FL 32202

Phone: 877-988-3782
Contact@VestaPropertyServices.com



Governmental Management Services

Serving Florida's Communities

January 17th, 2024

Bartram Springs Community Development District
c/o Wesley Haber, District Counsel
Kutak Rock LLP.
107 West College Avenue
Tallahassee, Florida 32301
Via email to Wesley.Haber@kutakrock.com

RE: Proposal for On-Site Amenity Management, Field Operations, and Maintenance Services

Dear Mr. Haber,

Governmental Management Services, L.L.C. ("GMS") is pleased to provide for your review our Proposal associated with providing Amenity Management, Field Operations, and Maintenance Services to the Bartram Springs Community Development District ("CDD"). We believe the Proposal demonstrates that we are the best choice for this project. Here are some of the reasons why:

- ❖ We are the leader in the Community Development District industry. We provide district management services to 250+ CDD's across the State of Florida.
- ❖ We have a team of management, financial, administrative, and operations professionals who are extremely qualified to provide these services and meet time and budget requirements.
- ❖ We have a proven approach, methodology, and philosophy towards providing these services that reflect our commitment and ability to deliver comprehensive services that exceed the expectations of our clients.
- ❖ We also have the ability to respond to individual client needs efficiently, effectively, and professionally. Our approach to providing the services for each of the responsibilities described in this RFP is to fully understand them and provide them in a manner that meets all the statutory requirements customized to the approach preferred by the Board of Supervisors.

We thank you for this opportunity to submit our Proposal and would be happy to provide any additional information if requested. Please feel free to contact me at (407) 841-5524, ext. 125, or via email at DMossing@gmstnn.com if you have any questions or need additional information.

Sincerely,

Darrin Mossing

Darrin Mossing
GMS President

Enclosures

ORLANDO

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

JACKSONVILLE

9655 Florida Mining Blvd. W
Suite 305
Jacksonville, FL 32257
(904) 940-5850

ST. AUGUSTINE

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

FT. LAUDERDALE

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

TAMPA

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

PALM COAST

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

KNOXVILLE

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

Proposal For Amenity Management Services Prepared For The Bartram Springs Community Development District:



GOVERNMENTAL MANAGEMENT SERVICES, L.L.C.

AMENITY MANAGEMENT,
FIELD OPERATIONS, AND
MAINTENANCE SERVICES

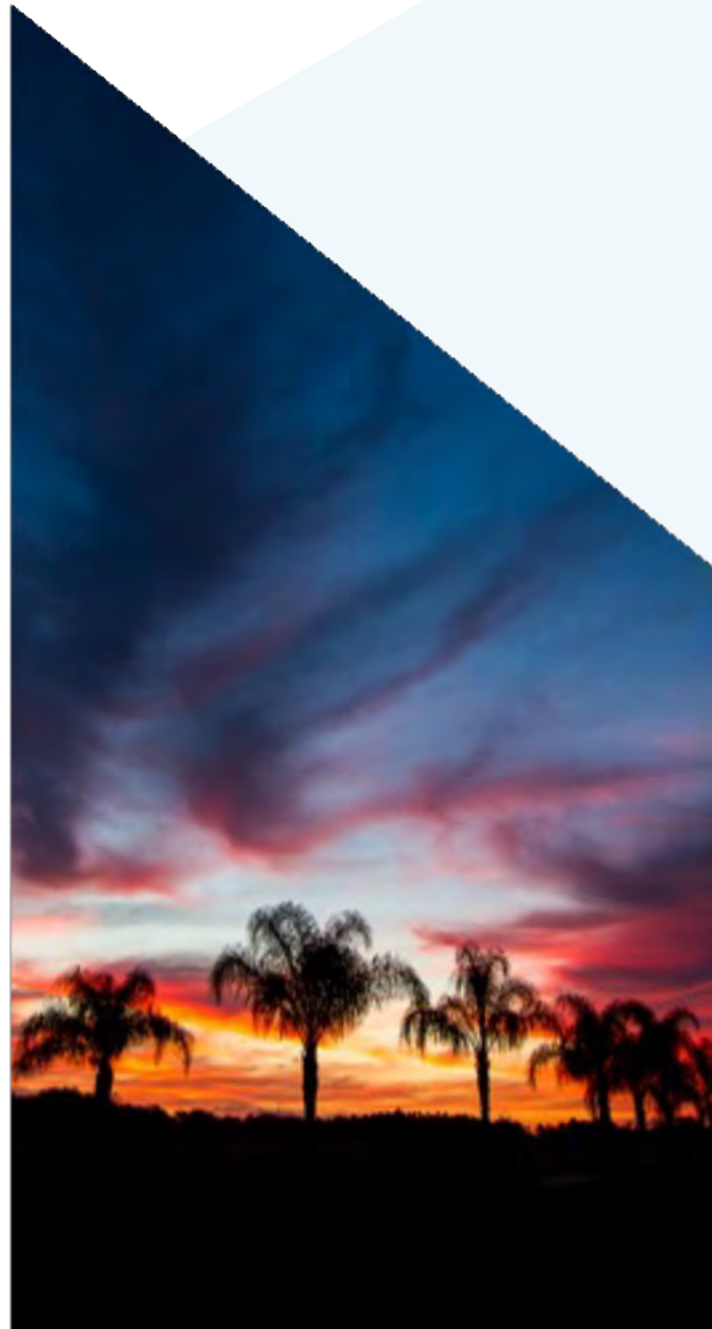


www.govmgtsvc.com

Submitted

January 17th, 2024

TABLE OF CONTENTS



COMPANY INFORMATION
3

HOW WE WORK
4

CONTACT INFORMATION
6

FAMILY OF GMS COMPANIES
7

OUR TEAM
8

SERVICES
10

REFERENCES
20

EXPERIENCE SUMMARY
21

COST OF SERVICES
29

THANK YOU
32

SECTION 4 AND 5 RFP QUESTIONNAIRE
33 - 45

ADDITIONAL RFP QUESTIONS (Exhibit B)

- Full-Time & Part-Time Benefits 46
- Proposed Staff Resumes/CVs 47
- Sample Community Communications 54
- Sample Board Reporting 67
- Training Overview 102
- Quality Assurance Overview 103
- Additional Corporate Support 104

HOW WE WORK

Established in 2004, Governmental Management Services has over 250 full time and part time employees and has offices across the State of Florida. Our commitment to serving our clients and providing the most efficient, effective and comprehensive management services for Community Development Districts continues to fuel our growth.

Statement of Qualifications

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

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

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

FULLY INTEGRATED SERVICES



These management services are being provided by the principals of GMS to over 250 Community Development Districts across the State of Florida.

OUR VALUES

MISSION

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



CORE VALUES

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



Customer Commitment

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



Integrity

We are honest, open, ethical, and fair.

People trust us to do what's right.



Teamwork

We win together, not alone.

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



Passion and Drive

We are proud of the services we provide.

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



Empower Individuals

Our employees set us apart.

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



Quality

Details matter.

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

CONTACT INFORMATION

Corporate Office:

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

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



GMS - North Florida Operations Offices

9655 Florida Mining
Boulevard,
Suites 305 & 306,
Jacksonville,
Florida
32257

(904) 288-7667

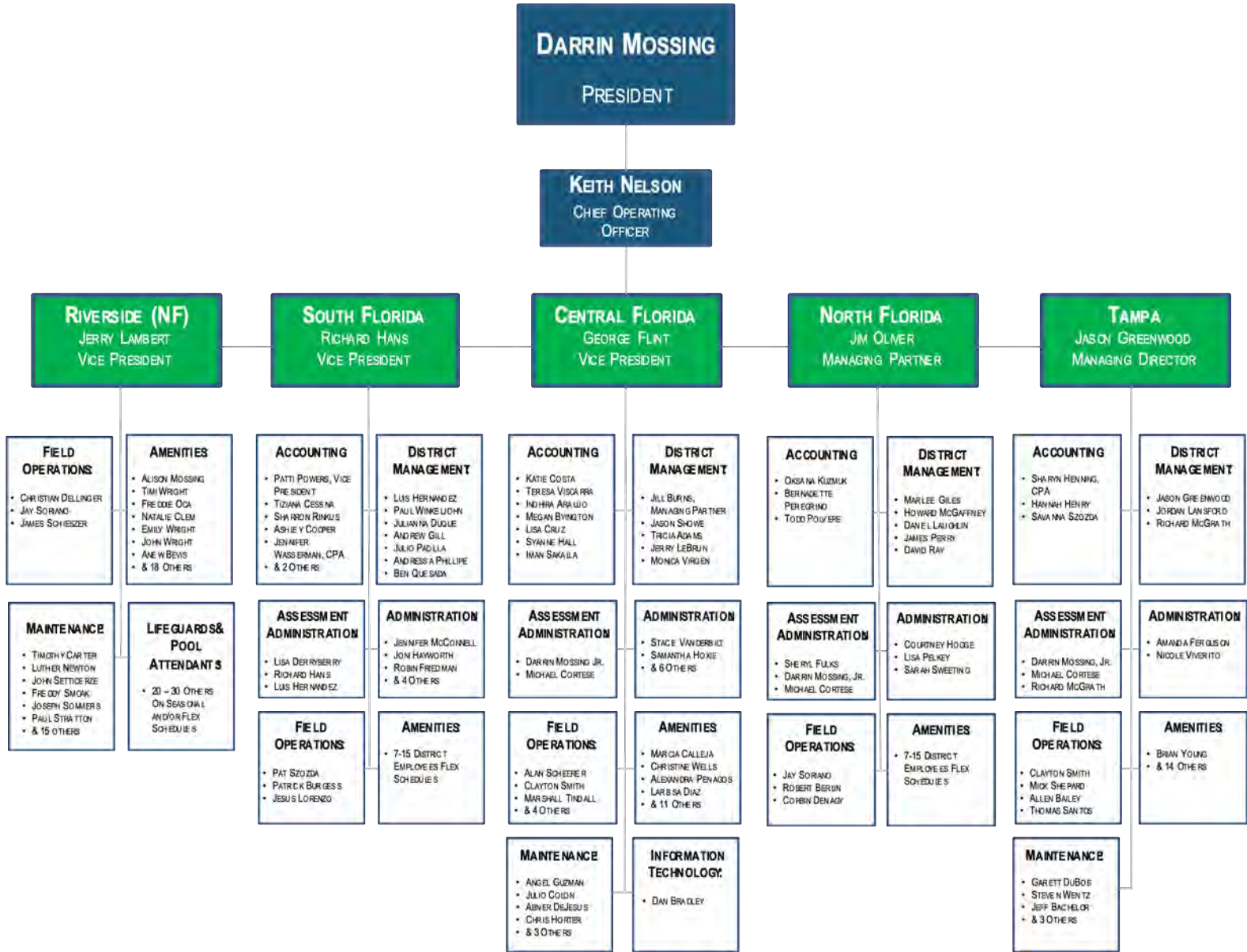
GMS - North Florida Administrative Offices

475 West Town Place,
Suite 114
St. Augustine,
Florida
32092


(904) 940-5850
(904) 940-5899 Fax

We have additional
satellite or/branch
offices throughout
the State of Florida

FAMILY OF COMPANIES



OUR TEAM



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

STATEMENT OF STAFF CONSISTENCY

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

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

EDUCATION

Ohio University, 1988,
Bachelor of Science in
Accounting

EXPERIENCE

34 Years

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

DARRIN MOSSING

PRESIDENT

Darrin Mossing is the President and Founder of the GMS organization. Mr. Mossing graduated from the Ohio University with a Bachelor’s degree in accounting in June 1988 and began his career as a staff accountant on September 1, 1988, for Indian Trace Community Development District. In November 2004, Mr. Mossing established the GMS organization, which has grown to over 250 CDDs, Homeowners Association and other Special Taxing Districts across the State of Florida.

JIM OLIVER

MANAGING PARTNER

Jim Oliver, as managing director of the GMS-North Florida Office, also provides district management services for GMS clients in the Northeast Florida region. Mr. Oliver has a Bachelor of Science Degree in Accounting from the State University of New York. He also has a Master’s of Business Administration from Touro University. After 22 years of active-duty service with the United States Army and Florida National Guard, he retired as a Lieutenant Colonel. He has gained broad experience in governmental liaison work at the local, state and federal levels with experience in utility acquisitions, valuations and negotiations. He has been with GMS since 2005.

EDUCATION

Bachelor of Science in
Accounting From The
State University Of New
York

EXPERIENCE

18 Years

- District Management
 - Assessment Roll
Administration
- 22 Years U.S. Army

JAMES PERRY, CPA

PARTNER

James Perry has over 19 years of experience in District Management Services. Mr. Perry graduated from the University of Central Florida with a Bachelor of Business Administration in Accounting degree. He has also attended the prestigious University of Pennsylvania-Wharton Executive Development program. He has served in senior financial positions with Fortune 100 companies as well as with the largest governmental utility provider in Northeast Florida. He is also a licensed CPA.

AMENITY MANAGEMENT & LIFESTYLE PROGRAMMING

Alison Mossing is the Director of Amenity Management Services. Alison Mossing relocated to Palm Coast, FL in 2021 from Nashville, TN to join the GMS organization. She graduated with her accounting degree from Middle Tennessee State University in 2017 and spent the next four years working as an accountant in the entertainment industry in Nashville. Since joining the organization, Alison has been active in assisting with district accounting, recruiting and field reporting. Alison was recently promoted to the position of Director of Amenity Services, and now leads our Amenity Management Services practice where she utilizes her experience in entertainment and financial literacy to lead our team of Amenity Management professionals .



AMENITY MANAGEMENT & FACILITY ATTENDANT **SERVICES**

Communities with Amenity Centers hire GMS to provide a full-time, salaried Amenity Manager on a year-round basis. The Amenity Manager shall have the responsibilities of overseeing all amenity facilities and related direct service contracts, interacting with other entities as needed, including recreational programs and special events.

GMS HAS THE ABILITY TO CREATE A UNIQUE SCHEDULE TO ACCOMMODATE THE NEEDS OF THE COMMUNITY. SERVICES INCLUDE ALL ITEMS DESCRIBED IN THE RFP AND THE FOLLOWING:

- The Amenity Manager is the liaison for the Community Development District Board of Supervisors and will attend all District meetings.
- The Amenity Manager will prepare a monthly Manager's Report detailing all activity such as District events, planned events, resident concerns, information regarding completed and planned maintenance projects, etc.
- Respond to all resident questions and concerns regarding the District in a timely and professional manner.
- Maintain a professional relationship with all residents, welcoming and educating new homeowners, issuing access cards, updating resident information, supervising staff members, monitoring facility usage and rentals.
- Coordinate with Operations Manager to ensure all District contracts such as pool maintenance, landscape, janitorial, security, pest control, etc. are in compliance with contract specifications.
- Inspect Amenity Center and common areas for lighting, trash removal, pest control, signage and fencing for necessary maintenance. Inspections include recommendations to improve safety and minimize potential hazards in order to prevent accidents from occurring.
- Coordinate and/or assist with maintenance projects based upon monthly inspection reports

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- Inventory cleaning products, paper products, office and first aid supplies.
- Coordinate, organize, and promote various special events and activities throughout the year.
- Administer rental program of District Facilities for private parties and events.
- Educate staff members, lifeguards, security guards and public on District policies and procedures.
- Prepare report for recommendations regarding modifications/updates to the policies and procedures as needed.
- Process any insurance claims and related repair work.
- Provide recommendations for annual budget, maintenance program, policies and procedures, safety and community events.
- Responsible for sending CDD information for website updates.
- Interface with vendors for repairs, billing, payments and approve certain invoices.
- Design, promote and implement recreational programs. Recreational Programming is a critical component to satisfying every community. Input from the Board of Supervisors and residents will be sought regarding the selections of activities and special events.
- Youth activities will include, but are not limited to summer camp, teen scene and numerous sports leagues. Adult activities can include trivia, group fitness classes, aqua aerobics, themed dinners, and more.
- The Amenity Manager will also facilitate clubs such as "The Fitness Club," book clubs and "Morning Coffee."



SAMPLE SPECIAL EVENTS

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

SUMMER CAMP

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

FALL FESTIVAL

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

WINTER CELEBRATION

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

KIDS NIGHT OUT/TEEN SCENE

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

ICE CREAM SOCIAL

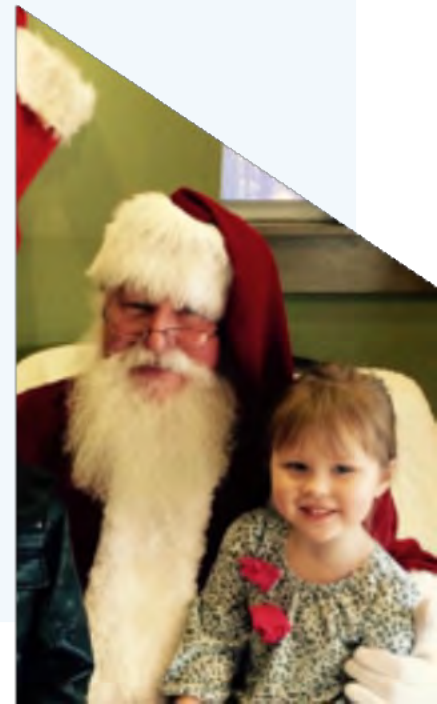
Ice cream and beverages with contests, raffles and games.

SPRING FLING

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

DIVE-IN MOVIE

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



SAMPLE NEWSLETTER

RANDAL PARK

Newsletter



SEPTEMBER 2023

Fun in the Community

- Senior Center** - Open to residents 65+... (Details about activities and hours)
- Senior Center** - Open to residents 65+... (Details about activities and hours)
- Senior Center** - Open to residents 65+... (Details about activities and hours)
- Senior Center** - Open to residents 65+... (Details about activities and hours)
- Senior Center** - Open to residents 65+... (Details about activities and hours)

GARAGE SALE

**Saturday, September 17th, 2022
9:00 am - 3:00 pm**

Please be sure to follow the necessary guidelines listed below during the garage sale:

- Residents must have their cars in the lot.
- Residents must have their cars in the lot.
- Residents must have their cars in the lot.

RANDAL PARK

Fun in the City

Meetings in the Community

- Residents' Meeting** - Open to all residents... (Details about the meeting)
- Residents' Meeting** - Open to all residents... (Details about the meeting)

Events in August



From the Randal Park CDD

Issue #1 - Residents' Meeting... (Details about the meeting)

From the Randal Park RPOA

The City of Orlando Street Parking Regulations
Revised by Council 5, Emergency of the City of Orlando Police Department

From the Randal Park RPOA

Board Meeting

Meeting on September 11th... (Details about the meeting)

Board Meeting

Meeting on September 11th... (Details about the meeting)

From the Randal Park RPOA

For Your Security

Please be sure to follow the necessary guidelines... (Details about security)

From the Randal Park THOA

Resident's Meeting - Open to all residents... (Details about the meeting)

Randal Park Reminders

For the community's enjoyment of 1/2 mile path - Please be sure to follow the necessary guidelines... (Details about path maintenance)



Important Numbers and Websites

- Randal Park CDD** - 407-228-1111
- Randal Park RPOA** - 407-228-1111
- Randal Park THOA** - 407-228-1111
- City of Orlando** - 407-228-1111
- Florida Department of Transportation** - 407-228-1111
- Florida Department of Transportation** - 407-228-1111
- Florida Department of Transportation** - 407-228-1111

Need to Contact Us?

Resident's Meeting - Open to all residents... (Details about the meeting)

Amenity Facility Hours of Operation for Residents

Facility	Hours of Operation
Resident's Meeting	Monday - Friday, 9:00 am - 5:00 pm
Resident's Meeting	Monday - Friday, 9:00 am - 5:00 pm

Randal Park RPOA - 407-228-1111

Randal Park THOA - 407-228-1111

OPERATIONS MANAGEMENT SERVICES

GMS provides Field Contract/Operations Management services to over 30 Districts throughout Florida. **Jerry Lambert** is the Director of Field Operations Management services in the North Florida region. For 28 years Jerry Lambert was the manager of the Prototype Metal Development Center and worked at the Engineering R & D facility in Auburn Hills, Michigan with Faurecia Automotive Seating. He has widespread experience with welding, automotives and assembly. He was the manager of a Testing Facility, Quality Lab, and Shipping & Receiving Departments for 15 years. He held a Michigan Builders License and owned a construction business for 20 years for commercial building interior renovations. Jerry leads customer delivery functions for the North Florida organization. **Jay Soriano** is our Field Operations Manager in Clay county, overseeing maintenance projects and providing field contract/operational management oversight services. After his first degree from East Carolina University, Jay then attended the University of Delaware, where he began his Master's studies in Health Administration and continued studies toward a second Bachelor's in Parks and Recreation programming. Over the past 25 years, Jay has worked as a Director of Recreation, Fitness and Aquatics, and as a manager for Facility operations for companies such as the YMCA, many small private fitness studios, and multiple CDD's, helping to guide them to successful program development, financial stability, and employee training. Working for GMS since 2012, Jay not only holds multiple professional certifications in many aspects of facilities maintenance, management, and program development, but also as an instructor for many professional organizations in Aquatics maintenance, and management, and pool construction.

PROPER OPERATION OF THE DISTRICTS INCLUDE:

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

PREVENTATIVE REPAIR & MAINTENANCE SERVICES

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

FIELD MANAGEMENT SERVICES

As a company, GMS provides field management services to 30 Districts throughout Florida.

GMS HAS THE ABILITY TO CREATE A UNIQUE SCHEDULE TO ACCOMMODATE THE NEEDS OF THE COMMUNITY. SERVICES INCLUDE ALL ITEMS DESCRIBED IN THE RFP AND THE FOLLOWING:

- Administer and manage maintenance contracts for landscaping and lake maintenance contracts.
- Respond to resident and Board of Supervisors inquiries regarding Maintenance Operations.
- Coordinate and implement maintenance projects throughout the community with vendors.
- Conduct site visits (day and nighttime) to ensure satisfactory operation of the district and prepare a monthly report to the Board.
- Review and approve construction contracts, change orders, payment request, etc. during construction phase if contracted.



FACILITY MAINTENANCE SERVICES

Every community has continuous needs for various maintenance requirements throughout the year. One of the many problems a community faces is who will perform the maintenance service, how much it will cost and when will it be completed. GMS has a strong team of experienced, dedicated and hard-working maintenance personnel with the ability to timely respond to most all maintenance issues throughout the community on a cost-effective basis.

SERVICES INCLUDE ALL ITEMS DESCRIBED IN THE RFP AND THE FOLLOWING:

- Light inspections and replacements
- Property inspections and trash removal
- Inspect and remove debris from lakes and outfall structures
- Inspect and clean pet receptacles
- Wildlife relocation program
- Paint facilities
- Refurbish spray ground & playground equipment
- Fence repairs
- Grinding of sidewalks (trip hazards)
- Fitness equipment preventive maintenance

SERVICES INCLUDE ALL ITEMS DESCRIBED IN THE RFP AND THE FOLLOWING:

- Service 1 to 5 times per week
- Sweep and mop tiled areas as necessary
- Clean restrooms, sinks, mirrors, fixtures, toilets and urinals
- Clean interior windows, baseboards, wipe down walls and doors
- Wipe down and sanitize fitness equipment
- Remove trash and replace trash can liners
- Restock supplies, paper products, etc. as needed
- Straighten deck furniture and blow off patio areas
- Pick up trash and debris from the amenity and pool areas

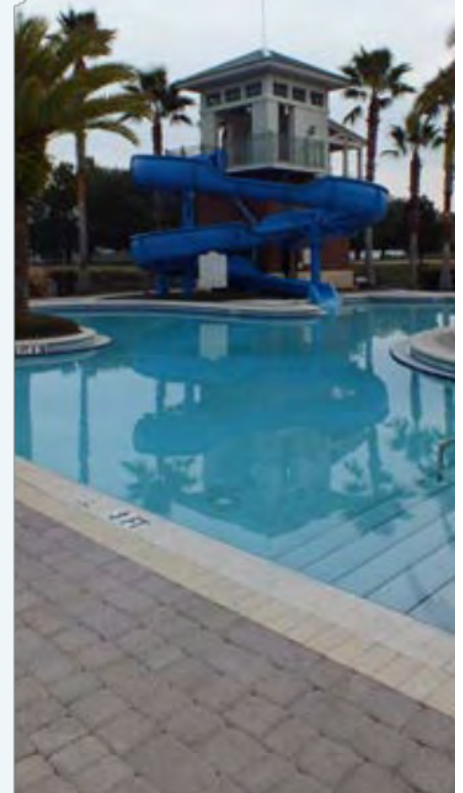


POOL MAINTENANCE SERVICES

GMS has over six (6) certified pool operators qualified to provide commercial pool maintenance services. Services are customized to meet each clients needs based upon seasonal factors and usage.

SERVICES INCLUDE ALL ITEMS DESCRIBED IN THE RFP AND THE FOLLOWING:

- Service 1 to 5 days per week
- Pool vacuuming
- Skimming
- Brushing tiles
- Chemical balance (Chlorine, PH, Alkalinity, Sequestrant)
- Pool and equipment inspections
- Cleaning of filters
- Blow off pool deck
- Chemicals provided by client
- Emergency call out services to be invoiced separately



LIFEGUARDING SERVICES

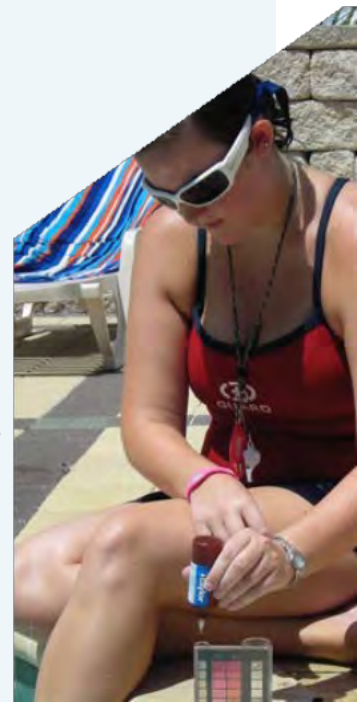
Lifeguards are American Red Cross certified in Lifeguarding, Water Park Lifeguarding, CPR, First Aid and AED for Adults, Infants and Children. For best results, lifeguards shall be at least 16 years of age and perform standard duties associated with an aquatic facility. The District will only be invoiced for actual hours of service.

A. Responsibility:

- The primary responsibility of our lifeguards is to prevent drowning and other injuries from occurring through continuous surveillance, eliminating hazardous behaviors, enforcing facility rules and regulations, recognizing and responding quickly to emergencies and working as a team with facility staff and management.
- Lifeguards will be "Rescue Ready" at all times and report unsafe conditions.
- Complete daily pool logs, equipment checklist and necessary forms that correspond with daily activities and incidents.
- Complete required in-service training to review EAP, CPR, First Aid, AED, and all rescue procedures.
- Straighten pool deck furniture, wipe tables, removing debris from pool deck area and walkways, replacing trashcan liners (as time permits) and maintaining restroom cleanliness and supplies, are all secondary responsibilities.
- Lifeguards shall be visited frequently by the Aquatics Director and/or Supervisor. Other secondary responsibilities of lifeguards include but are not limited to:
 - Cleaning pool tiles as time permits
 - Inspecting and maintaining First Aid supplies
 - Inspecting the slide and slide structure before opening pool
 - Testing pH and chlorine levels to maintain Health Department requirements (twice daily)
 - Skimming pool

B. Staffing Approach & Scheduling

- In the event of inclement weather, staff will follow and enforce District policies. If the weather is predicted to persist throughout the day, the Facility Supervisor shall direct staff accordingly.
- If at any time the Board of Supervisors would like to adjust the hours and/ or days of service, a two-week notices respectfully requested. GMS understands the need for flexibility in order to meet the needs of each community and will provide the necessary staffing in order to provide the services based upon the operating hours of the community.



REFERENCES

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

Cindy Nelsen

Chair, Double Branch CDD
1394 Canopy Oaks Drive
Orange Park, Florida 32065
(904) 424-9960

bcnelsen@comcast.net

Jeff Robinson

Chair, Amelia Walk CDD
85287 Majestic Walk Blvd
Fernandina Beach, FL 32034
(770) 990-0957

Awcdd.jeffrobinson@gmail.com

Batey McGraw

Chair, Wilford Preserve CDD
14701 Philips Highway, Suite 300
Jacksonville, Florida 32256
(904) 517-7983

batey.mcgraw@dreamfindershomes.com

GMS's current clients are listed in Table 2-1. This grid reflects a portion of the services provided to our clients.

GOVERNMENTAL MANAGEMENT SERVICES

Table 2-1. District Management Experience Summary

GMS Client #	GMS Client Name As of 2023-02-19	Florida State County	General Management	Accounting & Financial Reporting	Recording Secretary	Water / Wastewater Utility	Operations Management/ Amenities
1	Aberdeen	St. Johns	✓	✓	✓		
2	Academical Village	Broward	✓	✓	✓		✓
3	Amelia Concourse	Nassau	✓	✓	✓		
4	Amelia Walk	Nassau	✓	✓	✓		✓
5	Anabelle Island	Clay	✓	✓	✓		
6	Armstrong	Clay	✓	✓	✓		
7	Astoria	Polk	✓	✓	✓		✓
8	Ballentrae Hillsborough	Hillsborough	✓	✓	✓		✓
9	Bannon Lakes	St. Johns	✓	✓	✓		
10	Bartram Park	Duval	✓	✓	✓		
11	Bartram Springs	Duval	✓	✓	✓		
12	Bauer Drive	Miami-Dade	✓	✓	✓		
13	Bay Laurel Center	Marion	✓	✓	✓		
14	Baytree	Brevard	✓	✓	✓		✓
15	Baywinds	Miami-Dade	✓	✓	✓		✓
16	Beacon Tradeport	Miami-Dade	✓	✓	✓		
17	Bella Collina	Lake	✓	✓	✓	✓	✓
18	Bellagio	Miami-Dade	✓	✓	✓		
19	Belmont	Hillsborough	✓	✓	✓		✓
20	Bent Creek	St. Lucie	✓	✓	✓		
21	Biscayne Drive Estates	Miami-Dade	✓	✓	✓		
22	Bonita Village	Lee	✓	✓	✓		
23	Bonnet Creek	Orange	✓	✓	✓		✓
24	Bontaniko	Broward	✓	✓	✓		
25	Bradbury	Polk	✓	✓	✓		
26	Brandy Creek	St. Johns	✓	✓	✓		
27	Bridgewalk	Osceola	✓	✓	✓		✓
28	Campo Bello	Miami-Dade	✓	✓	✓		
29	Candler Hills	Marion	✓	✓	✓		
30	Canopy	Leon	✓	✓	✓		
31	Capital Region	Leon	✓	✓	✓		
32	Central Lake	Lake	✓	✓	✓		
33	Centre Lake	Miami-Dade	✓	✓	✓		✓
34	ChampionsGate	Osceola	✓	✓	✓		
35	ChampionsGate Property Owners	Osceola	✓	✓	✓		
36	ChampionsGate Villas Condo 1	Osceola	✓	✓	✓		
37	Chapel Creek	Pasco	✓	✓	✓		✓
38	City of Coral Gables**	Miami-Dade	✓	✓			
39	Coconut Cay	Miami-Dade	✓	✓	✓		✓
40	Copper Creek	St. Lucie	✓	✓	✓		
41	Copper Oaks	Lee	✓	✓	✓		
42	Coral Bay	Broward	✓	✓	✓		
43	Coral Keys Homes	Miami-Dade	✓	✓	✓		
44	Cordova Palms	St. Johns	✓	✓	✓		✓
45	Creekside	St. Lucie	✓	✓	✓		✓

CLIENT LISTING



GMS Client #	GMS Client Name As of 2023-02-19	Florida State County	General Management	Accounting & Financial Reporting	Recording Secretary	Water / Wastewater Utility	Operations Management/ Amenities
46	Crossings	Osceola	✓	✓	✓		✓
47	Crossings At Fleming Island, The	Clay	✓	✓	✓		
48	Crossroads Village Center	Polk	✓	✓	✓		
49	Crosswinds East	Polk	✓	✓	✓		
50	Crystal Cay	Miami-Dade	✓	✓	✓		
51	Cypress Bluff	Duval	✓	✓	✓		
52	Cypress Cove	Broward	✓	✓	✓		
53	Cypress Creek	Hillsborough	✓	✓	✓		
54	Cypress Park Estates	Polk	✓	✓	✓		✓
55	Cypress Ridge	Hillsborough	✓	✓	✓		
56	Davenport Road South	Polk	✓	✓	✓		✓
57	Deer Island	Lake	✓	✓	✓		✓
58	Deer Run	Flagler	✓	✓	✓		✓
59	Double Branch - Recreation	Clay	✓	✓	✓		✓
60	Dowden West	Orange	✓	✓	✓		✓
61	Downtown Doral	Miami-Dade	✓	✓	✓		
62	Downtown Doral South	Miami-Dade	✓	✓	✓		✓
63	Dunes	Flagler	✓	✓	✓		
64	Dupree Lakes	Pasco	✓	✓	✓		
65	Durbin Crossings	St. Johns	✓	✓	✓		
66	Eagle Hammock	Polk	✓	✓	✓		✓
67	East 547	Polk	✓	✓	✓		✓
68	East Homestead	Miami-Dade	✓	✓	✓		✓
69	Eden Hills	Polk	✓	✓	✓		✓
70	Elevation Point	St. Johns	✓	✓	✓		
71	Enclave @ Black Pointe Marina	Miami-Dade	✓	✓	✓		✓
72	Estancia at Wiregrass	Pasco	✓	✓	✓		
73	Eureka Grove	Miami-Dade	✓	✓	✓		
74	Falcon Trace	Orange	✓	✓	✓		✓
75	Forest Brooke	Hillsborough	✓	✓	✓		
76	Forest Lake	Polk	✓	✓	✓		✓
77	Founders Ridge	Lake	✓	✓	✓		
78	Gardens at Hammock Beach	Flagler	✓	✓	✓		
79	GIR East	Osceola	✓	✓	✓		
80	Grande Pines	Orange	✓	✓	✓		
81	Green Corridor**	-Multiple	✓	✓	✓		
82	Griffin Lakes	Broward	✓	✓	✓		
83	Hamilton Bluff	Polk	✓	✓	✓		
84	Hammock Reserve	Polk	✓	✓	✓		✓
85	Harbor Bay	Hillsborough	✓	✓	✓		
86	Hartford Terrace	Polk	✓	✓	✓		
87	Hemingway Point	Broward	✓	✓	✓		✓
88	Heritage Park	St. Johns	✓	✓	✓		✓
89	Heron Isles	Nassau	✓	✓	✓		
90	Hickory Tree	Osceola	✓	✓	✓		

CLIENT LISTING



GMS Client #	GMS Client Name As of 2023-02-19	Florida State County	General Management	Accounting & Financial Reporting	Recording Secretary	Water / Wastewater Utility	Operations Management/ Amenities
91	Hicks Ditch	Lake	✓	✓	✓		
92	Highland Meadows West	Polk	✓	✓	✓		✓
93	Holly Hill Road East	Polk	✓	✓	✓		✓
94	Hollywood Beach	Broward	✓	✓	✓		
95	Homestead 50	Pasco	✓	✓	✓		
96	Indigo	Volusia	✓	✓	✓		
97	Indigo East	Marion	✓	✓	✓		
98	Interlaken	Broward	✓	✓	✓		
99	Islands at Doral Townhomes	Miami-Dade	✓	✓	✓		
100	Islands of Doral III	Miami-Dade	✓	✓	✓		
101	Isle of Bartram Park	St. Johns	✓	✓	✓		
102	Kingman Gate	Miami-Dade	✓	✓	✓		✓
103	Knightsbridge	Osceola	✓	✓	✓		
104	Lake Ashton	Polk	✓	✓	✓		
105	Lake Ashton II	Polk	✓	✓	✓		
106	Lake Deer	Polk	✓	✓	✓		
107	Lake Emma	Lake	✓	✓	✓		✓
108	Lake Harris	Lake	✓	✓	✓		
109	Lake Lizzi	Osceola	✓	✓	✓		
110	Lake Mattie Preserve	Polk	✓	✓	✓		
111	Lakes by the Bay South	Miami-Dade	✓	✓	✓		✓
112	Lakeside Plantation	Sarasota	✓	✓	✓		
113	Landings	Flagler	✓	✓	✓		
114	Landings @ Miami Beach	Miami-Dade	✓	✓	✓		
115	Lawson Dunes	Polk	✓	✓	✓		
116	Live Oak Lake	Osceola	✓	✓	✓		✓
117	Lucaya	Lee	✓	✓	✓		
118	Lucerne Park	Polk	✓	✓	✓		✓
119	Majorca Isles	Miami-Dade	✓	✓	✓		
120	Mayfair	Brevard	✓	✓	✓		
121	McJunkin @ Parkland	Broward	✓	✓	✓		
122	Meadowview @ Twin Creeks	St. Johns	✓	✓	✓		
123	Mediterranea	Palm Beach	✓	✓	✓		
124	Middle Village	Clay	✓	✓	✓		
125	Mirada	Lee	✓	✓	✓		
126	Montecito	Brevard	✓	✓	✓		✓
127	Narcoossee	Orange	✓	✓	✓		✓
128	Nob Hill HOA	Broward	✓	✓	✓		
129	North Boulevard	Polk	✓	✓	✓		✓
130	North Powerline Road	Polk	✓	✓	✓		✓
131	North Springs	Broward	✓	✓	✓		
132	Northern Riverwalk	Palm Beach	✓	✓	✓		
133	Oakridge	Broward	✓	✓	✓		
134	Old Hickory	Osceola	✓	✓	✓		✓
135	Old Palm	Palm Beach	✓	✓	✓		

CLIENT LISTING



GMS Client #	GMS Client Name As of 2023-02-19	Florida State County	General Management	Accounting & Financial Reporting	Recording Secretary	Water / Wastewater Utility	Operations Management/ Amenities
136	Orchid Grove	Broward	✓	✓	✓		✓
137	Osceola Chain of Lakes	Osceola	✓	✓	✓		✓
138	OTC	Duval	✓	✓	✓		
139	Palm Coast Park	Flagler	✓	✓	✓		
140	Palm Glades	Miami-Dade	✓	✓	✓		✓
141	Palms of Terra Ceia Bay	Manatee	✓	✓	✓		
142	Park Creek	Hillsborough	✓	✓	✓		
143	Peace Creek	Polk	✓	✓	✓		✓
144	Pine Air Lakes	Collier	✓	✓	✓		
145	Pine Isles	Miami-Dade	✓	✓	✓		
146	Pine Ridge Plantation	Clay	✓	✓	✓		
147	Poinciana	Polk	✓	✓	✓		✓
148	Poinciana West	Polk	✓	✓	✓		✓
149	Pollard Road	Polk	✓	✓	✓		
150	Portofino Isles	St. Lucie	✓	✓	✓		
151	Portofino Landings	St. Lucie	✓	✓	✓		✓
152	Portofino Shores	St. Lucie	✓	✓	✓		
153	Portofino Springs	Lee	✓	✓	✓		
154	Portofino Vineyards	Lee	✓	✓	✓		
155	Portofino Vista	Osceola	✓	✓	✓		
156	Preston Cove	Osceola	✓	✓	✓		
157	Quail Roost	Miami-Dade	✓	✓	✓		
158	Randal Park	Orange	✓	✓	✓		✓
159	Randal Park POA	Orange	✓				✓
160	Randal Park THOA	Orange	✓				✓
161	Remington	Osceola	✓	✓	✓		✓
162	Reserve	St. Lucie	✓	✓	✓		
163	Reserve II	St. Lucie	✓	✓	✓		
164	Residences at Tohoqua HOA	Osceola	✓				✓
165	Reunion East	Osceola	✓	✓	✓		✓
166	Reunion West	Osceola	✓	✓	✓		✓
167	Rhodine Road North	Hillsborough	✓	✓	✓		✓
168	Ridgewood Trails	Clay	✓	✓	✓		
169	River Place	St. Lucie	✓	✓	✓		✓
170	Riverbend	Hillsborough	✓	✓	✓		
171	Rivercrest	Hillsborough	✓	✓	✓		
172	Rivers Edge	St. Johns	✓	✓	✓		
173	Rivers Edge II	St. Johns	✓	✓	✓		
174	Rivers Edge III	St. Johns	✓	✓	✓		
175	Riverwalk (Everbe)	Orange	✓	✓	✓		
176	Rolling Hills	Clay	✓	✓	✓		
177	Rolling Oaks	Osceola	✓	✓	✓		
178	Sabal Palm	Broward	✓	✓	✓		
179	Saddle Creek Preserve of PC	Polk	✓	✓	✓		✓
180	Sampson Creek	St. Johns	✓	✓	✓		

CLIENT LISTING



GMS Client #	GMS Client Name As of 2023-02-19	Florida State County	General Management	Accounting & Financial Reporting	Recording Secretary	Water / Wastewater Utility	Operations Management/ Amenities
181	San Simeon	Miami-Dade	✓	✓	✓		✓
182	Sandmine Road	Polk	✓	✓	✓		✓
183	Sawyer's Landing	Miami-Dade	✓	✓	✓		
184	Scenic Highway	Polk	✓	✓	✓		✓
185	Scenic Terrace North	Polk	✓	✓	✓		
186	Scenic Terrace South	Polk	✓	✓	✓		✓
187	Schaller Preserve	Polk	✓	✓	✓		
188	Sedona Point	Miami-Dade	✓	✓	✓		
189	Shingle Creek	Osceola	✓	✓	✓		✓
190	Shingle Creek @ Bronson	Osceola	✓	✓	✓		✓
191	Siena North	Miami-Dade	✓	✓	✓		
192	Silver Palms	Miami-Dade	✓	✓	✓		
193	Six Mile	Clay	✓	✓	✓		
194	Solterra	Miami-Dade	✓	✓	✓		
195	South Dade Venture	Miami-Dade	✓	✓	✓		
196	South Kendall	Miami-Dade	✓	✓	✓		
197	South Village	Clay	✓	✓	✓		
198	St. Augustine Lakes CDD	St. Johns	✓	✓	✓		
199	Stoneybrook South	Osceola	✓	✓	✓		✓
200	Stoneybrook South @ CG	Osceola	✓	✓	✓		✓
201	Storey Creek	Osceola	✓	✓	✓		✓
202	Storey Drive	Orange	✓	✓	✓		✓
203	Storey Park	Orange	✓	✓	✓		✓
204	Sweetwater Creek	St. Johns	✓	✓	✓		
205	Talis Park	Collier	✓	✓	✓		
206	Tapestry	Osceola	✓	✓	✓		✓
207	Terra Bella	Pasco	✓	✓	✓		
208	Tesoro	St. Lucie	✓	✓	✓		✓
209	TIFA	Brevard	✓	✓	✓		
210	Tison's Landing	Duval	✓	✓	✓		
211	Tohoqua	Osceola	✓	✓	✓		✓
212	Tohoqua Master Association	Osceola	✓				✓
213	Tohoqua Reserve	Osceola	✓				✓
214	Tolomato	St. Johns	✓	✓	✓		
215	Towne Park	Polk	✓	✓	✓		✓
216	Townhomes at Tohoqua	Osceola	✓				✓
217	Tranquility	Brevard	✓	✓	✓		
218	Treeline Preserve	Lee	✓	✓	✓		
219	Turtle Run	Broward	✓	✓	✓		✓
220	Valencia Water Control District	Orange	✓	✓	✓		
221	Veranda Landing	St. Lucie	✓	✓	✓		
222	Verano #1	St. Lucie	✓	✓	✓		
223	Verano #2	St. Lucie	✓	✓	✓		
224	Verano #3	St. Lucie	✓	✓	✓		
225	Verano #4	St. Lucie	✓	✓	✓		

CLIENT LISTING



GMS Client #	GMS Client Name As of 2023-02-19	Florida State County	General Management	Accounting & Financial Reporting	Recording Secretary	Water / Wastewater Utility	Operations Management/ Amenities
226	Verano #5	St. Lucie	✓	✓	✓		
227	Verano Center	St. Lucie	✓	✓	✓		
228	Viera East	Brevard	✓	✓	✓		
229	Villa Portofino East	Miami-Dade	✓	✓	✓		
230	Villa Portofino West	Miami-Dade	✓	✓	✓		
231	Villages of Biscayne Park	Miami-Dade	✓	✓	✓		
232	Villages Of Bloomingdale	Hillsborough	✓	✓	✓		
233	Villamar	Polk	✓	✓	✓		✓
234	Vizcaya in Kendall	Miami-Dade	✓	✓	✓		✓
235	Water's Edge	Pasco	✓	✓	✓		
236	Waterford Estates	Charlotte	✓	✓	✓		
237	Waterstone	St. Lucie	✓	✓	✓		
238	Weiberg Road	Polk	✓	✓	✓		
239	Wellness Ridge	Lake	✓	✓	✓		
240	Westside	Osceola	✓	✓	✓		✓
241	Westside Haines City	Polk	✓	✓	✓		
242	Westview North	Miami-Dade	✓	✓	✓		
243	Westwood OCC	Orange	✓	✓	✓		
244	Wilford Preserve	Clay	✓	✓	✓		
245	Willow Creek	Brevard	✓	✓	✓		✓
246	Wind Meadows South	Polk	✓	✓	✓		✓
247	Windsor at Westside	Osceola	✓	✓	✓		✓
248	Windsor Cay	Lake	✓	✓	✓		
249	Windward	Osceola	✓	✓	✓		✓
250	Woodland Ranch Estates	Polk	✓	✓	✓		
251	Wynnfield Lakes	Duval	✓	✓	✓		
252	Wynnmere West	Hillsborough	✓	✓	✓		
253	Yarborough Lane	Polk	✓	✓	✓		
254	Zephyr Ridge	Pasco	✓	✓	✓		
255							
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CLIENT LISTING



RISK MANAGEMENT REQUIREMENTS

ACORD CERTIFICATE OF LIABILITY INSURANCE DATE (MMDDYYYY) 01/12/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsements.

PRODUCER: Zelen Risk Solutions, Inc. 7964 Devoe Street Jacksonville FL 32220
CONTACT NAME: Holly Howe
PHONE (904) 262-8080 **FAX (904) 262-1444**
E-MAIL: holly@zelenrisk.com

INSURED: Governmental Management Services, LLC 1001 Bradford Way Kingston TN 37763
INSURER A: Security National Insurance Company
INSURER B: OBE Specialty Insurance Company

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

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

LINE	TYPE OF INSURANCE	ADDL. POLY. NO.	POLICY NUMBER	POLICY EFF. DATE	POLICY EXP. DATE	LIMITS
A	COMMERCIAL GENERAL LIABILITY CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR		SES1794996-00	10/01/2023	10/01/2024	EACH OCCURRENCE: \$1,000,000
						DAMAGE TO RENTED EQUIPMENT (Per accident): \$100,000
						MED. EXP. (Per person): \$10,000
						PERSONAL & ADV. INJURY: \$1,000,000
						GENERAL AGGREGATE: \$2,000,000
						PRODUCTS - COMP/OP AGG: \$2,000,000
USEFUL AGGREGATE LIMIT APPLIES PER: POLICY <input checked="" type="checkbox"/> PRO. <input type="checkbox"/> LOC. <input type="checkbox"/>						
AUTOMOBILE LIABILITY						
	ANY AUTO					COMBINED SINGLE LIMIT (Per accident): \$3
	ALL OWNED AUTOS					BODILY INJURY (Per person): \$3
	SCHEDULED AUTOS					BODILY INJURY (Per accident): \$3
	HIRED AUTOS					PROPERTY DAMAGE: \$3
	NON-OWNED AUTOS					UM. AGGREGATE: \$3
B	UMBRELLA LIAB. EXCESS LIAB.		MC0X101157-00	10/01/2023	10/01/2024	EACH OCCURRENCE: \$2,000,000
						AGGREGATE: \$2,000,000
USEFUL AGGREGATE LIMIT APPLIES PER: POLICY <input type="checkbox"/> PRO. <input type="checkbox"/> LOC. <input type="checkbox"/>						
WORKERS COMPENSATION AND EMPLOYERS' LIABILITY: ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Indicate in box) <input type="checkbox"/> Y/N/A						
FED. EMPLOYER'S RESP. TO EMPLOYERS' LIABILITY: <input type="checkbox"/> Y/N/A						
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 90, Additional Remarks Schedule, if more space is required)						

ACORD CERTIFICATE OF LIABILITY INSURANCE DATE (MMDDYYYY) 01/12/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsements.

PRODUCER: StateFarm Edie Williams State Farm 300 AIA N Suite 304 Ponte Vedra, FL 32082
CONTACT NAME: Angela Dietrich
PHONE (904) 425-4024 **FAX (904) 425-4049**
E-MAIL: Angela@EdieWilliams.com

INSURED: Governmental Management Services, LLC 1001 Bradford Way Kingston, TN 37763
INSURER A: State Farm Mutual Automobile Insurance Company 2517B

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

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

LINE	TYPE OF INSURANCE	ADDL. POLY. NO.	POLICY NUMBER	POLICY EFF. DATE	POLICY EXP. DATE	LIMITS
	COMMERCIAL GENERAL LIABILITY CLAIMS-MADE <input type="checkbox"/> OCCUR <input type="checkbox"/>					EACH OCCURRENCE: \$3
						DAMAGE TO RENTED EQUIPMENT (Per accident): \$3
						MED. EXP. (Per person): \$3
						PERSONAL & ADV. INJURY: \$3
						GENERAL AGGREGATE: \$3
						PRODUCTS - COMP/OP AGG: \$3
USEFUL AGGREGATE LIMIT APPLIES PER: POLICY <input type="checkbox"/> PRO. <input type="checkbox"/> LOC. <input type="checkbox"/>						
AUTOMOBILE LIABILITY						
	ANY AUTO					COMBINED SINGLE LIMIT (Per accident): \$3
	OWNED AUTOS ONLY					BODILY INJURY (Per person): \$1,000,000
	SCHEDULED AUTOS ONLY					BODILY INJURY (Per accident): \$1,000,000
	HIRED AUTOS ONLY					PROPERTY DAMAGE: \$1,000,000
	NON-OWNED AUTOS ONLY					UM. AGGREGATE: \$3
B	UMBRELLA LIAB. EXCESS LIAB.					EACH OCCURRENCE: \$3
						AGGREGATE: \$3
USEFUL AGGREGATE LIMIT APPLIES PER: POLICY <input type="checkbox"/> PRO. <input type="checkbox"/> LOC. <input type="checkbox"/>						
WORKERS COMPENSATION AND EMPLOYERS' LIABILITY: ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Indicate in box) <input type="checkbox"/> Y/N/A						
FED. EMPLOYER'S RESP. TO EMPLOYERS' LIABILITY: <input type="checkbox"/> Y/N/A						
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 90, Additional Remarks Schedule, if more space is required)						

RISK MANAGEMENT REQUIREMENTS

ACORD **CERTIFICATE OF LIABILITY INSURANCE** (DATE (MM/DD/YYYY)) 01/12/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsements.

PRODUCER: Zelen Risk Solutions, Inc. 7964 Dove Street Jacksonville FL 32220

CONTACT: Vicky Zelen (904) 292-9980 FAX (904) 292-1444 E-MAIL: vicky@zelenrisk.com

INSURER(S) AFFORDING COVERAGE:

INSURER A: Security National Insurance Company
INSURER B: Bridgefield Casualty Insurance Company
INSURER C: Hartford Fire Insurance Company
INSURER D: Nautius Insurance Company

INSURED: Riverside Management Services, Inc. 1001 Bradford Way Kingston TN 37763

COVERAGES **CERTIFICATE NUMBER:** 9651794006-03 **REVISION NUMBER:**

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

TYPE	TYPE OF INSURANCE	ACORD 101	ACORD 102	POLICY NUMBER	ISSUE DATE (MM/DD/YYYY)	EXPIRES (MM/DD/YYYY)	LIMITS
A	COMMERCIAL GENERAL LIABILITY CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> GENERAL AGGREGATE LIMIT APPLIED PER POLICY: <input checked="" type="checkbox"/> PER POLICY <input type="checkbox"/> LOC. <input type="checkbox"/> OTHER			9651794006-03	07/27/2023	07/27/2024	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES \$ 100,000 MED. EXP. (Adv. Care Period) \$ 5,000 PERSONAL AND ADJ. INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP. OP. \$ 2,000,000
D	INSUREE'S LIABILITY SCHEDULED AUTOS ONLY <input checked="" type="checkbox"/> AUTOS ONLY <input type="checkbox"/> AUTOS <input type="checkbox"/>			AN1296126	10/18/2023	07/27/2024	EACH OCCURRENCE \$ 1,000,000 AGGREGATE \$ 1,000,000
B	WORKER'S COMPENSATION AND EMPLOYERS' LIABILITY ANY EMPLOYER/EMPLOYEE/INDEPENDENT CONTRACTOR (Mandatory in HI) EMP. DISEASE (Policy Limit)			196-23349	10/18/2023	10/18/2024	E.A. EACH ACCIDENT \$ 1,000,000 E.I. DISEASE - EMPLOYEES \$ 1,000,000 E.I. DISEASE - POLICY LIMIT \$ 1,000,000
C	Crime			211P0343210-22	11/04/2022	11/04/2023	Employee theft on Client's Premises \$500,000

DESCRIPTION OF OPERATIONS/LOCATIONS (VEHICLES (ACORD 101, Additional Payment Schedule, may be attached more spaces if required))
Certificate holder is additional insured with respect to the general liability when required by written contract.

CERTIFICATE HOLDER: Barram Springs CDD 475 West Town Place Suite 114 St Augustine, FL 32092

CANCELLATION: SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
AUTHORIZED REPRESENTATIVE: Vicky M. Zelen

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ACORD **CERTIFICATE OF LIABILITY INSURANCE** (DATE (MM/DD/YYYY)) 01/16/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsements.

PRODUCER: State Farm Edie Williams State Farm 330 A1A N Suite 324 Ponte Vedra, FL 32082

CONTACT: Angela Dietrich (904) 425-8054 FAX (904) 425-8049 E-MAIL: Angela@EdieWilliams.com

INSURER(S) AFFORDING COVERAGE: State Farm Mutual Automobile Insurance Company 2517B

INSURED: Riverside Management Services, Inc. 1001 Bradford Way Kingston, TN 37763

COVERAGES **CERTIFICATE NUMBER:** E13 2052-AD7-59E **REVISION NUMBER:**

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

TYPE	TYPE OF INSURANCE	ACORD 101	ACORD 102	POLICY NUMBER	ISSUE DATE (MM/DD/YYYY)	EXPIRES (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY CLAIMS-MADE <input type="checkbox"/> OCCUR <input type="checkbox"/> GENERAL AGGREGATE LIMIT APPLIED PER POLICY: <input type="checkbox"/> PER POLICY <input type="checkbox"/> LOC. <input type="checkbox"/> OTHER			E13 2052-AD7-59E	01/07/2024	07/07/2024	EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES \$ MED. EXP. (Adv. Care Period) \$ PERSONAL AND ADJ. INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP. OP. \$
	AUTOMOBILE LIABILITY ANY AUTO <input checked="" type="checkbox"/> SCHEDULED AUTOS ONLY <input checked="" type="checkbox"/> AUTOS ONLY <input type="checkbox"/> AUTOS <input type="checkbox"/>			E13 2052-AD7-59E	01/07/2024	07/07/2024	EACH OCCURRENCE \$ 1,000,000 MEDICAL INJURY (Per person) \$ 1,000,000 PROPERTY DAMAGE (Per accident) \$ 1,000,000
	INSUREE'S LIABILITY SCHEDULED AUTOS ONLY <input checked="" type="checkbox"/> AUTOS ONLY <input type="checkbox"/> AUTOS <input type="checkbox"/>						EACH OCCURRENCE \$ AGGREGATE \$
	WORKER'S COMPENSATION AND EMPLOYERS' LIABILITY ANY EMPLOYER/EMPLOYEE/INDEPENDENT CONTRACTOR (Mandatory in HI) EMP. DISEASE (Policy Limit)						E.A. EACH ACCIDENT \$ E.I. DISEASE - EMPLOYEE \$ E.I. DISEASE - POLICY LIMIT \$

DESCRIPTION OF OPERATIONS/LOCATIONS (VEHICLES (ACORD 101, Additional Payment Schedule, may be attached more spaces if required))

CERTIFICATE HOLDER: Barram Springs CDD 475 West Town Place, Suite 114 St. Augustine, FL 32092

CANCELLATION: SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
AUTHORIZED REPRESENTATIVE: Angela Dietrich

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COST OF SERVICES

MANAGEMENT SERVICES

Management services will be provided for a fixed annual fee.

See Exhibit "A".

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





EXHIBIT "A" – FEE SCHEDULE

Bartram Springs Fee Proposal As Requested In The RFP					
Fiscal Year 2024 (March to September, 2024)					
Position	Annual Hours	Wage	Gross	Burden	Total Fee
General Manager	1,200	\$ 36.06	\$ 43,269	\$ 18,711	\$ 61,980
Facility Manager/Lifestyle Director	1,200	\$ 24.04	\$ 28,846	\$ 15,284	\$ 44,130
Field Operations Manager	1,200	\$ 28.85	\$ 34,615	\$ 16,655	\$ 51,270
Sr. Guest Services Attendant	660	\$ 15.00	\$ 9,900	\$ 2,433	\$ 12,333
Guest Services Attendant	2,050	\$ 15.00	\$ 30,747	\$ 6,470	\$ 37,217
Fitness Center Monitor	840	\$ 20.00	\$ 16,800	\$ 3,769	\$ 20,569
Sr. Maintenance Tech.	1,200	\$ 25.00	\$ 30,000	\$ 15,558	\$ 45,558
Maintenance Tech.	600	\$ 25.00	\$ 15,000	\$ 5,095	\$ 20,095
Lead Lifeguard	353	\$ 18.00	\$ 6,355	\$ 2,484	\$ 8,839
Lifeguards	2,667	\$ 15.00	\$ 40,007	\$ 14,478	\$ 54,485
Event Attendant	35	\$ 15.00	\$ 519	\$ 389	\$ 908
Total	12,005		\$ 256,059	\$ 101,326	\$ 357,385
Fiscal Year 2025					
Position	Annual Hours	Wage	Gross	Burden	Total Fee
General Manager	2,080	\$ 36.06	\$ 75,000	\$ 32,433	\$ 107,433
Facility Manager/Lifestyle Director	2,080	\$ 24.04	\$ 50,000	\$ 26,492	\$ 76,492
Field Operations Manager	2,080	\$ 28.85	\$ 60,000	\$ 28,868	\$ 88,868
Sr. Guest Services Attendant	1,144	\$ 15.00	\$ 17,160	\$ 4,218	\$ 21,378
Guest Services Attendant	3,553	\$ 15.00	\$ 53,295	\$ 11,214	\$ 64,509
Fitness Center Monitor	1,456	\$ 20.00	\$ 29,120	\$ 6,533	\$ 35,653
Sr. Maintenance Tech.	2,080	\$ 25.00	\$ 52,000	\$ 26,968	\$ 78,968
Maintenance Tech.	1,040	\$ 25.00	\$ 26,000	\$ 8,832	\$ 34,832
Lead Lifeguard	612	\$ 18.00	\$ 11,016	\$ 4,305	\$ 15,321
Lifeguards	4,623	\$ 15.00	\$ 69,345	\$ 25,095	\$ 94,440
Event Attendant	60	\$ 15.00	\$ 900	\$ 674	\$ 1,574
Total	20,808		\$ 443,836	\$ 175,632	\$ 619,468
Fiscal Year 2026					
				1.06	
Position	Annual Hours	Wage	Gross	Burden	Total Fee
General Manager	2,080	\$ 38.22	\$ 79,500	\$ 34,378	\$ 113,878
Facility Manager/Lifestyle Director	2,080	\$ 25.48	\$ 53,000	\$ 28,082	\$ 81,082
Field Operations Manager	2,080	\$ 30.58	\$ 63,600	\$ 30,600	\$ 94,200
Sr. Guest Services Attendant	1,144	\$ 15.90	\$ 18,190	\$ 4,471	\$ 22,660
Guest Services Attendant	3,553	\$ 15.90	\$ 56,493	\$ 11,887	\$ 68,379
Fitness Center Monitor	1,456	\$ 21.20	\$ 30,867	\$ 6,925	\$ 37,793
Sr. Maintenance Tech.	2,080	\$ 26.50	\$ 55,120	\$ 28,586	\$ 83,706
Maintenance Tech.	1,040	\$ 26.50	\$ 27,560	\$ 9,362	\$ 36,922
Lead Lifeguard	612	\$ 19.08	\$ 11,677	\$ 4,563	\$ 16,240
Lifeguards	4,623	\$ 15.90	\$ 73,506	\$ 26,601	\$ 100,107
Event Attendant	60	\$ 15.90	\$ 954	\$ 714	\$ 1,668
Total	20,808		\$ 470,466	\$ 186,170	\$ 656,636
Fiscal Year 2027					
				1.08	
Position	Annual Hours	Wage	Gross	Burden	Total Fee
General Manager	2,080	\$ 41.28	\$ 85,860	\$ 37,129	\$ 122,989
Facility Manager/Lifestyle Director	2,080	\$ 27.52	\$ 57,240	\$ 30,328	\$ 87,568
Field Operations Manager	2,080	\$ 33.02	\$ 68,688	\$ 33,049	\$ 101,737
Sr. Guest Services Attendant	1,144	\$ 17.17	\$ 19,645	\$ 4,828	\$ 24,473
Guest Services Attendant	3,553	\$ 17.17	\$ 61,012	\$ 12,838	\$ 73,850
Fitness Center Monitor	1,456	\$ 22.90	\$ 33,337	\$ 7,479	\$ 40,816
Sr. Maintenance Tech.	2,080	\$ 28.62	\$ 59,530	\$ 30,872	\$ 90,402
Maintenance Tech.	1,040	\$ 28.62	\$ 29,765	\$ 10,111	\$ 39,876
Lead Lifeguard	612	\$ 20.61	\$ 12,611	\$ 4,928	\$ 17,539
Lifeguards	4,623	\$ 17.17	\$ 79,386	\$ 28,729	\$ 108,115
Event Attendant	60	\$ 17.17	\$ 1,030	\$ 771	\$ 1,802
Total	20,808		\$ 508,103	\$ 201,063	\$ 709,167



EXHIBIT "A" – FEE SCHEDULE – ALTERNATIVE MODEL

Bartram Springs Fee Proposal - Alternative Staffing Model

Fiscal Year 2024 (March to September, 2024)

Position	Employee Name	Annual Hours	Wage	Gross	Burden	Total Fee
General Manager	Terry Glynn	520	\$ 50.00	\$ 15,000	\$ 6,487	\$ 21,487
Amenity Manager/Lifestyle Director	Leah Tincher	2,080	\$ 36.06	\$ 43,269	\$ 18,711	\$ 61,980
Field Operations Manager	Chip Dellinger	2,080	\$ 28.85	\$ 34,615	\$ 16,655	\$ 51,270
Sr. Guest Services Attendant	Laurie Hogan	1,144	\$ 15.00	\$ 9,900	\$ 2,433	\$ 12,333
Guest Services Attendant	John Wright	3,553	\$ 15.00	\$ 30,747	\$ 6,470	\$ 37,217
Fitness Center Monitor	Art Holms	1,456	\$ 20.00	\$ 16,800	\$ 3,769	\$ 20,569
Maintenance Tech.	Tyler Maason	2,080	\$ 25.00	\$ 30,000	\$ 15,558	\$ 45,558
Lead Lifeguard	Seasonal Hires	612	\$ 18.00	\$ 6,355	\$ 2,484	\$ 8,839
Lifeguards	Seasonal Hires	4,623	\$ 15.00	\$ 40,007	\$ 14,478	\$ 54,485
Event Attendant	Emily Wright	60	\$ 17.17	\$ 594	\$ 445	\$ 1,039
Total		18,208		\$ 227,288	\$ 87,489	\$ 314,778
					Savings	11.9%

Fiscal Year 2025

Position	Employee Name	Annual Hours	Wage	Gross	Burden	Total Fee
General Manager	Terry Glynn	520	\$ 50.00	\$ 26,000	\$ 11,243	\$ 37,243
Amenity Manager/Lifestyle Director	Leah Tincher	2,080	\$ 36.06	\$ 75,000	\$ 32,433	\$ 107,433
Field Operations Manager	Chip Dellinger	2,080	\$ 28.85	\$ 60,000	\$ 28,868	\$ 88,868
Sr. Guest Services Attendant	Laurie Hogan	1,144	\$ 15.00	\$ 17,160	\$ 4,218	\$ 21,378
Guest Services Attendant	John Wright	3,553	\$ 15.00	\$ 53,295	\$ 11,214	\$ 64,509
Fitness Center Monitor	Art Holms	1,456	\$ 20.00	\$ 29,120	\$ 6,533	\$ 35,653
Maintenance Tech.	Tyler Maason	2,080	\$ 25.00	\$ 52,000	\$ 26,968	\$ 78,968
Lead Lifeguard	Seasonal Hires	612	\$ 18.00	\$ 11,016	\$ 4,305	\$ 15,321
Lifeguards	Seasonal Hires	4,623	\$ 15.00	\$ 69,345	\$ 25,095	\$ 94,440
Event Attendant	Emily Wright	60	\$ 17.17	\$ 1,030	\$ 771	\$ 1,802
Total		18,208		\$ 393,966	\$ 151,648	\$ 545,615
					Savings	11.9%

Fiscal Year 2026

1.06

Position	Employee Name	Annual Hours	Wage	Gross	Burden	Total Fee
General Manager	Terry Glynn	2,080	\$ 13.25	\$ 27,560	\$ 11,918	\$ 39,478
Facility Manager/Lifestyle Director	Leah Tincher	2,080	\$ 38.22	\$ 79,500	\$ 34,378	\$ 113,878
Field Operations Manager	Chip Dellinger	2,080	\$ 30.58	\$ 63,600	\$ 30,600	\$ 94,200
Sr. Guest Services Attendant	Laurie Hogan	1,144	\$ 15.90	\$ 18,190	\$ 4,471	\$ 22,660
Guest Services Attendant	John Wright	3,553	\$ 15.90	\$ 56,493	\$ 11,887	\$ 68,379
Fitness Center Monitor	Art Holms	1,456	\$ 21.20	\$ 30,867	\$ 6,925	\$ 37,793
Sr. Maintenance Tech.	Tyler Maason	2,080	\$ 26.50	\$ 55,120	\$ 28,586	\$ 83,706
Maintenance Tech.	Seasonal Hires	1,040	\$ 11.23	\$ 11,677	\$ 4,563	\$ 16,240
Lead Lifeguard	Seasonal Hires	612	\$ 120.11	\$ 73,506	\$ 26,601	\$ 100,107
Lifeguards	Emily Wright	4,623	\$ 0.24	\$ 1,092	\$ 818	\$ 1,910
Total		20,748		\$ 417,604	\$ 160,747	\$ 578,352
					Savings	11.9%

Fiscal Year 2027

1.08

Position	Employee Name	Annual Hours	Wage	Gross	Burden	Total Fee
General Manager	Terry Glynn	2,080	\$ 14.31	\$ 29,765	\$ 12,871	\$ 42,636
Facility Manager/Lifestyle Director	Leah Tincher	2,080	\$ 41.28	\$ 85,860	\$ 37,129	\$ 122,989
Field Operations Manager	Chip Dellinger	2,080	\$ 33.02	\$ 68,688	\$ 33,049	\$ 101,737
Sr. Guest Services Attendant	Laurie Hogan	1,144	\$ 17.17	\$ 19,645	\$ 4,828	\$ 24,473
Guest Services Attendant	John Wright	3,553	\$ 17.17	\$ 61,012	\$ 12,838	\$ 73,850
Fitness Center Monitor	Art Holms	1,456	\$ 22.90	\$ 33,337	\$ 7,479	\$ 40,816
Sr. Maintenance Tech.	Tyler Maason	2,080	\$ 28.62	\$ 59,530	\$ 30,872	\$ 90,402
Maintenance Tech.	Seasonal Hires	1,040	\$ 12.13	\$ 12,611	\$ 4,928	\$ 17,539
Lead Lifeguard	Seasonal Hires	612	\$ 129.72	\$ 79,386	\$ 28,729	\$ 108,115
Lifeguards	Emily Wright	4,623	\$ 0.26	\$ 1,180	\$ 883	\$ 2,063
Total		20,748		\$ 451,013	\$ 173,607	\$ 624,620
					Savings	11.9%

TO THE BOARD OF SUPERVISORS OF **Bartram Springs CDD**



SERVING
FLORIDA'S
COMMUNITIES



Address:
475 West Town Place, Suite 114
St. Augustine, FL 32092



Direct Phone Line:
(407) 841-5524 x 125



Darrin Mossing, GMS President:
DMOSSING@GMSTNN.COM

**BARTRAM SPRINGS COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS FOR
AMENITY MANAGEMENT, FIELD OPERATIONS, AND MAINTENANCE SERVICES PROPOSAL
DECEMBER 6th, 2023**

Proposal Submitted By

Governmental Management Services, L.L.C. - January 17th, 2024

4.A GENERAL PROPOSER INFORMATION

Proposer General Information:

Proposer Name Governmental Management Services, L.L.C.
Street Address 475 West Town Place, Suite 114
P. O. Box (if any) _____
City St. Augustine State Florida Zip Code 32092
Telephone (904) 940-5850 Fax no. (904) 940-5899
1st Contact Name Darrin Mossing Title President
2nd Contact Name James Oliver Title Managing Partner
Parent Company Name (if any) Not Applicable
Street Address _____
P. O. Box (if any) _____
City _____ State _____ Zip Code _____
Telephone _____ Fax no. _____
1st Contact Name _____ Title _____
2nd Contact Name _____ Title _____

Company Standing:

Proposer's Corporate Form: Limited Liability Company
(e.g., individual, corporation, partnership, limited liability company, etc.)
In what State was the Proposer organized? Florida Date December 1, 2004

Is the Proposer in good standing with that State? Yes X No _____

If no, please explain _____

Is the Proposer registered with the State of Florida, Division of Corporations and authorized to do business in Florida?
Yes X No _____

If no, please explain _____

What are the Proposer's current insurance limits?

General Liability \$ 1,000,000 Expires 2024-10-01
Automobile Liability \$ Included in G/L Policy Expires 2024-07-27
Workers' Compensation \$ 2,000,000 Expires 2024-10-23

Licensure – Please list all applicable state and federal licenses, and state whether such licenses are presently in good standing:

St. Johns County Business Yes, In Good Standing
Duval County Business Yes, In Good Standing

Does the Proposer intend to use any subcontractors in connection with this work? YES X NO

Proposer subcontractor General Information:

Proposer Name Riverside Management Services, Inc.
Street Address 9655 Florida Mining Boulevard, Building #300, Suites 305 and 306
P. O. Box (if any) _____
City Jacksonville State Florida Zip Code 32257
Telephone (904) 288-7667 Fax no. (904) 940-5899
1st Contact Name Darrin Mossing Title President
2nd Contact Name Jerry Lambert Title Vice President
Parent Company Name (if any) Not Applicable

**BARTRAM SPRINGS COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS FOR
AMENITY MANAGEMENT, FIELD OPERATIONS, AND MAINTENANCE SERVICES PROPOSAL
DECEMBER 6th, 2023**

On a separate document to be included with your submittal, please provide responses to the following:

Please See EXHIBIT B

Provide details regarding the benefits you provide your employees (please differentiate between PT and FT)

See Proposal Page 46

Provide resumes/profiles for all proposed salaried (General Manager, Field Operations Manager, Facility Manager/Lifestyle Director, etc.) onsite staff and those providing direct corporate support.

See Proposal Page 47

Describe and provide examples of your approach to resident engagement: (eblasts, mobile apps, website, surveying, social media, newsletters, etc.)

See Proposal Page 55

Provide examples of recent Board Reporting for similar-sized communities. (Amenity Manager Report, Lifestyle Report, Event Recap, Project Trackers, etc.)

See Proposal Page 66

Describe training provided to employees (HR, job specific, certifications, etc.).

See Proposal Page 103

Describe your approach to quality assurance with respect to the services you are proposing: What processes/tools do you use to ensure the quality of services you provide?

See Proposal Page 104

Describe what support onsite personnel get from corporate. (Operational Management, Payroll Support, HR, IT, Accounts Payable, etc.)

See Proposal Page 105

**BARTRAM SPRINGS COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS FOR
AMENITY MANAGEMENT, FIELD OPERATIONS, AND MAINTENANCE SERVICES PROPOSAL
DECEMBER 6th, 2023**

4.B. EXPERIENCE

Has the Proposer performed work for a community development district or master planned residential community in excess of 200 acres previously? Yes X No ___ If yes, please provide the following information for each project (attach additional sheets if necessary): (attach additional sheets as needed):

#1	Project Name/Location	Middle Village Community Development District/Clay County
	Contact Name	Michael Steiner, Chair mjsmvedd@yahoo.com
	Contact Phone:	(904) 579-4250
	Project Description	Master planned community with full amenities, for 1,059 single-family units, 2,102 multifamily units and 330,000 square feet of commercial.
	Annual Dollar Amount Of Contract:	\$422,003.00
	Scope of Services For Project	CDD Management Services, Provide full-time onsite community and operations manager, rental coordinator, and part-time administrator. Manage all contracts, conduct special events, address resident and community issues, etc. Provide full-time tennis professional.
	Dates Served:	This client joined GMS on November 26, 2006 and they have been a client for 17 years and 1+ months.
#2	Project Name/Location	Double Branch Community Development District/Clay County
	Contact Name	Cindy Nelsen, Chair bcnelson@comcast.net
	Contact Phone:	(904) 424-9960
	Project Description	Master planned community with full amenities, for 2,197 single-family units, 289 multifamily units, and 43,000 square feet of commercial.
	Annual Dollar Amount Of Contract:	\$304,741.00
	Scope of Services For Project	CDD Management Services, Provide full time onsite community and operations manager, rental coordinator and part-time administrator. Manage all contracts, conduct special events, address resident and community issues, etcetera.
	Dates Served:	This client joined GMS on November 26, 2006 and they have been a client for 17 years and 1+ months.
#3	Project Name/Location	Capital Region Community Development District/Leon County
	Contact Name	Kyle Rojas, Chair lkrojasodd@gmail.com
	Contact Phone:	(850) 321-5012
	Project Description	Master planned community in Leon County with 614 residential units, 850 Apartments, and 94,589 square feet of commercial space.
	Annual Dollar Amount Of Contract:	\$225,744.00
	Scope of Services For Project	CDD Management Services. Provide oversight of lake maintenance, irrigation, parks, etcetera.
	Dates Served:	This client joined GMS on January 05, 2006 and they have been a client for 18 years and 0+ months.
#4	Project Name/Location	Amelia Walk Community Development District/Nassau County
	Contact Name	Jeffrey Robinson, Chair awcdd.jeffrobinson@gmail.com
	Contact Phone:	(770) 990-0957
	Project Description	Master planned community in Nassau County with 749 residential units.
	Annual Dollar Amount Of Contract:	\$169,162.00
	Scope of Services For Project	CDD Management Services, Amenity Management, Dissemination Agent Services, and Field Operations Management Oversight Services.
	Dates Served:	This client joined GMS on January 03, 2006 and they have been a client for 18 years and 0+ months.
#5	Project Name/Location	Bartram Springs Community Development District/Duval County
	Contact Name	Andrew Walden, Chair andrewbscdd@gmail.com
	Contact Phone:	(904) 338-5344
	Project Description	Master planned community in Duval County with full amenities for 1,694 residential units and 21,818 square feet of commercial space.
	Annual Dollar Amount Of Contract:	\$69,104.00
	Scope of Services For Project	CDD Management Services.
	Dates Served:	This client joined GMS on July 11, 2005 and they have been a client for 18 years and 6+ months.

Community References (List all CDDs/HOAs where Amenity Services are currently provided)

As listed above.

(1) Bartram Springs has 1,694 Occupied Households so communities of similar size will be most relevant for Board evaluation and comparison.

**BARTRAM SPRINGS COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS FOR
AMENITY MANAGEMENT, FIELD OPERATIONS, AND MAINTENANCE SERVICES PROPOSAL
DECEMBER 6th, 2023**

List the Proposer's total annual dollar value of amenity center management and grounds maintenance management completed for each of the last five (5) years starting with the latest year and ending with the most current year:

	GMS Amenity Management	GMS Field Operations Management
2019	\$ 900,000	\$ 625,000
2020	\$ 1,000,000	\$ 750,000
2021	\$ 1,100,000	\$ 830,000
2022	\$ 1,200,000	\$ 900,000
2023	\$ 1,800,000	\$ 1,100,000

Rounded Up

Has the Proposer, or any of its principals or supervisory personnel (e.g., owner, officer, or supervisor, etc.), been terminated from any management contract within the past 3 years? Yes X No

For each such incident, please provide the following information (attach additional sheets as needed)

#1 Project Name/Location Turnbull Creek Community Development District/St. Johns County
 Contact Name Brian Wing, Chair bj3412@msn.com
 Contact Phone: (518) 727-4359
 Project Description Master planned community.
 Annual Dollar Amount Of Contract: \$50,000.00
 Scope of Services For Project CDD Management Services
 Dates Served: 07/26/2005 to 05/17/2022
 Reason for Termination: GMS had a District Manager that resigned. The Board decided to go to market and placed CDD Management responsibilities with another firm; GMS continues to support this client with Field Management and IT services.

#2 Project Name/Location _____
 Contact Name _____
 Contact Phone: _____
 Project Description _____
 Annual Dollar Amount Of Contract: _____
 Scope of Services For Project _____
 Dates Served: _____
 Reason for Termination: _____

Has the Proposer been cited by OSHA for any job site or company office/shop safety violations in the past five years?

Yes No X

If yes, please describe each violation, fine, and resolution _____

Has the Proposer experienced any worker injuries resulting in a worker losing more than ten (10) working days as a result of the injury in the past five years? Yes No X

If yes, please describe each incident _____

List all OSHA Regulatory training and job specific training completed by your employees:

Proposer embraces safety practices in the workplace. We also provider periodic OSHA safety training to our staff including: Ladder training, height protection training, lifting training, lift (operations) training, etcetera as needed. Our new employees are assigned a mentor and all staff are under the direction of our Property Management Team who provide training and/or certifications. We also support on-line and/or in-person training with expense reimbursement opportunities as part of our professional development programs both with GMS and RMS.

**BARTRAM SPRINGS COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS FOR
AMENITY MANAGEMENT, FIELD OPERATIONS, AND MAINTENANCE SERVICES PROPOSAL
DECEMBER 6th, 2023**

- Please provide OSHA 300A Summary for the prior 3 years with Proposal.

OSHA's Form 300A (Rev. 01/2004)
Summary of Work-Related Injuries and Illnesses

Year 2023

U.S. Department of Labor
Occupational Safety and Health Administration
Form approved OMB no. 1218-0176

All establishments covered by Part 1904 must complete this Summary page, even if no work-related injuries or illnesses occurred during the year. Remember to review the Log to verify that the entries are complete and accurate before completing this summary.

Using the Log, count the individual entries you made for each category. Then write the totals below, making sure you've added the entries from every page of the Log. If you had no cases, write "0".

Employees, former employees, and their representatives have the right to review the OSHA Form 300 in its entirety. They also have limited access to the OSHA Form 301 or its equivalent. See 29 CFR Part 1904.35, in OSHA's recordkeeping rule, for further details on the access provisions for these forms.

Number of Cases			
Total number of deaths	Total number of cases with days away from work	Total number of cases with job transfer or restriction	Total number of other recordable cases
0	0	0	0
(G)	(H)	(I)	(J)

Number of Days	
Total number of days away from work	Total number of days of job transfer or restriction
0	0
(K)	(L)

Injury and Illness Types			
Total number of ...			
(M)			
(1) Injuries	0	(4) Poisonings	0
(2) Skin Disorders	0	(5) Hearing loss	0
(3) Respiratory conditions	0	(6) All other illnesses	0

* Establishing baselines for the collection of information is essential to prevent 10 minutes per employee, including time to review the instructions, insert and gather the data needed, and complete and review the collection of information. Please see our request for information on the collection of information related to OSHA's current version. If you have any comments about these requests or any other aspects of the data collection, contact: U.S. Department of Labor, OSHA Office of Statistical Analysis, Room 7-3644, 200 Constitution Avenue, NW, Washington, DC 20210. Be sure to send the completed form to this office.

Establishment Information	
Your establishment name	Government Management Services LLC
Street	475 West Town Place, Suite 114
City	St. Augustine
State	FL
ZIP	32092
Industry description (e.g. Manufacture of motor truck trailers)	
Standard Industrial Classification (SIC), if known (e.g. 3715)	
OR	
North American Industrial Classification (NAICS), if known (e.g. 336212)	
Employment information (If you don't have these figures, see the Worksheet on the back of this page to estimate.)	
Annual average number of employees	22
Total hours worked by all employees last year	46724
Sign here	<i>Kelly Adams</i>
Knowingly falsifying this document may result in a fine.	
I certify that I have examined this document and that to the best of my knowledge the entries are true, accurate, and complete.	
Company executive	<i>Kelly Adams H.R. Director</i>
Phone	<i>(853) 717-7700</i>
Date	<i>12/15/2023</i>

OSHA's Form 300A (Rev. 01/2004)
Summary of Work-Related Injuries and Illnesses

Year 2023

U.S. Department of Labor
Occupational Safety and Health Administration
Form approved OMB no. 1218-0176

All establishments covered by Part 1904 must complete this Summary page, even if no work-related injuries or illnesses occurred during the year. Remember to review the Log to verify that the entries are complete and accurate before completing this summary.

Using the Log, count the individual entries you made for each category. Then write the totals below, making sure you've added the entries from every page of the Log. If you had no cases, write "0".

Employees, former employees, and their representatives have the right to review the OSHA Form 300 in its entirety. They also have limited access to the OSHA Form 301 or its equivalent. See 29 CFR Part 1904.35, in OSHA's recordkeeping rule, for further details on the access provisions for these forms.

Number of Cases			
Total number of deaths	Total number of cases with days away from work	Total number of cases with job transfer or restriction	Total number of other recordable cases
0	0	0	0
(G)	(H)	(I)	(J)

Number of Days	
Total number of days away from work	Total number of days of job transfer or restriction
0	0
(K)	(L)

Injury and Illness Types			
Total number of ...			
(M)			
(1) Injuries	0	(4) Poisonings	0
(2) Skin Disorders	0	(5) Hearing loss	0
(3) Respiratory conditions	0	(6) All other illnesses	0

* Establishing baselines for the collection of information is essential to prevent 10 minutes per employee, including time to review the instructions, insert and gather the data needed, and complete and review the collection of information. Please see our request for information on the collection of information related to OSHA's current version. If you have any comments about these requests or any other aspects of the data collection, contact: U.S. Department of Labor, OSHA Office of Statistical Analysis, Room 7-3644, 200 Constitution Avenue, NW, Washington, DC 20210. Be sure to send the completed form to this office.

Establishment Information	
Your establishment name	Government Management Services LLC
Street	475 West Town Place, Suite 114
City	St. Augustine
State	FL
ZIP	32092
Industry description (e.g. Manufacture of motor truck trailers)	
Standard Industrial Classification (SIC), if known (e.g. 3715)	
OR	
North American Industrial Classification (NAICS), if known (e.g. 336212)	
Employment information (If you don't have these figures, see the Worksheet on the back of this page to estimate.)	
Annual average number of employees	25
Total hours worked by all employees last year	21301
Sign here	<i>Kelly Adams</i>
Knowingly falsifying this document may result in a fine.	
I certify that I have examined this document and that to the best of my knowledge the entries are true, accurate, and complete.	
Company executive	<i>Kelly Adams H.R. Director</i>
Phone	<i>(853) 717-7700</i>
Date	<i>12/15/2023</i>

**BARTRAM SPRINGS COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS FOR
AMENITY MANAGEMENT, FIELD OPERATIONS, AND MAINTENANCE SERVICES PROPOSAL
DECEMBER 6th, 2023**

OSHA's Form 300A (Rev. 01/2004) Year 2 0 2 3

Summary of Work-Related Injuries and Illnesses

U.S. Department of Labor
Occupational Safety and Health Administration
Form approved OSHA no. 1218-0178

All establishments covered by Part 1904 must complete this Summary page, even if no work-related injuries or illnesses occurred during the year. Remember to review the Log to verify that the entries are complete and accurate before completing this summary.

Using the Log, count the individual entries you made for each category. Then write the totals below, making sure you've added the entries from every page of the Log. If you had no cases, write "0".

Employees, former employees, and their representatives have the right to review the OSHA Form 300 in its entirety. They also have limited access to the OSHA Form 301 or its equivalent. See 29 CFR Part 1904.35, in OSHA's recordkeeping rule, for further details on the access provisions for these items.

Number of Cases			
Total number of deaths	Total number of cases with days away from work	Total number of cases with job transfer or restriction	Total number of other recordable cases
(G) 0	(H) 0	(I) 0	(J) 0

Number of Days	
Total number of days away from work	Total number of days of job transfer or restriction
(K) 0	(L) 0

Injury and Illness Types			
Total number of ... (M)			
(1) Injuries	0	(4) Poisonings	0
(2) Skin Disorders	0	(5) Hearing loss	0
(3) Respiratory conditions	0	(6) All other illnesses	0

Please reporting burden for this collection of information is estimated to average 20 minutes per response, including the time to review the instructions, search existing data sources, gather and review the collection of information, review and revise the collection of information, prepare and report to the collection of information under a reporting burden OSHA control number. If you have any comments about these estimates or any other aspect of this data collection, contact the U.S. Department of Labor, OSHA Office of Statistical Analysis, Room N-3641, 200 Constitution Avenue, NW, Washington, DC 20370. Do not send the completed form to this office.

Establishment Information

Your establishment name: Governmental Management Services LLC

Street: 475 West Town Place, Suite 114

City: St. Augustine State: FL ZIP: 32092

Industry description (e.g. Manufacture of motor truck trailers)

Standard Industrial Classification (SIC), if known (e.g. 3715)

OR

North American Industrial Classification (NAICS), if known (e.g. 336212)

Employment Information (If you don't have these figures, use the Worksheet on the back of this page to estimate.)

Annual average number of employees: 25

Total hours worked by all employees last year: 21901

Sign here: *Kelly Adams*
Knowingly falsifying this document may result in a fine.

I certify that I have examined this document and that to the best of my knowledge the entries are true, accurate, and complete.

Kelly Adams Title: HR Director
Company executive
Phone: (850) 717-7700 x 201 Date: 5/31/2023

OSHA's Form 300A (Rev. 01/2004) Year 2 0 2 3

Summary of Work-Related Injuries and Illnesses

U.S. Department of Labor
Occupational Safety and Health Administration
Form approved OSHA no. 1218-0178

All establishments covered by Part 1904 must complete this Summary page, even if no work-related injuries or illnesses occurred during the year. Remember to review the Log to verify that the entries are complete and accurate before completing this summary.

Using the Log, count the individual entries you made for each category. Then write the totals below, making sure you've added the entries from every page of the Log. If you had no cases, write "0".

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Number of Cases			
Total number of deaths	Total number of cases with days away from work	Total number of cases with job transfer or restriction	Total number of other recordable cases
(G) 0	(H) 0	(I) 0	(J) 0

Number of Days	
Total number of days away from work	Total number of days of job transfer or restriction
(K) 0	(L) 0

Injury and Illness Types			
Total number of ... (M)			
(1) Injuries	0	(4) Poisonings	0
(2) Skin Disorders	0	(5) Hearing loss	0
(3) Respiratory conditions	0	(6) All other illnesses	0

Please reporting burden for this collection of information is estimated to average 20 minutes per response, including the time to review the instructions, search existing data sources, gather and review the collection of information, review and revise the collection of information, prepare and report to the collection of information under a reporting burden OSHA control number. If you have any comments about these estimates or any other aspect of this data collection, contact the U.S. Department of Labor, OSHA Office of Statistical Analysis, Room N-3641, 200 Constitution Avenue, NW, Washington, DC 20370. Do not send the completed form to this office.

Establishment Information

Your establishment name: Governmental Management Services LLC

Street: 475 West Town Place, Suite 114

City: St. Augustine State: FL ZIP: 32092

Industry description (e.g. Manufacture of motor truck trailers)

Standard Industrial Classification (SIC), if known (e.g. 3715)

OR

North American Industrial Classification (NAICS), if known (e.g. 336212)

Employment Information (If you don't have these figures, use the Worksheet on the back of this page to estimate.)

Annual average number of employees: 0

Total hours worked by all employees last year: 0

Sign here: *Kelly Adams*
Knowingly falsifying this document may result in a fine.

I certify that I have examined this document and that to the best of my knowledge the entries are true, accurate, and complete.

Kelly Adams Title: HR Director
Company executive
Phone: (850) 717-7700 x 201 Date: 5/31/2023

**BARTRAM SPRINGS COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS FOR
AMENITY MANAGEMENT, FIELD OPERATIONS, AND MAINTENANCE SERVICES PROPOSAL
DECEMBER 6th, 2023**

OSHA's Form 300A (Rev. 01/2004)

Year 2 0 2 3
U.S. Department of Labor
Occupational Safety and Health Administration
Form approved OMB no. 1218-0178

Summary of Work-Related Injuries and Illnesses

All establishments covered by Part 1904 must complete this Summary page, even if no work-related injuries or illnesses occurred during the year. Remember to review the Log to verify that the entries are complete and accurate before completing this summary.

Using the Log, count the individual entries you made for each category. Then write the totals below, making sure you've added the entries from every page of the Log. If you had no cases, write "0".

Employees, former employees, and their representatives have the right to review the OSHA Form 300 in its entirety. They also have limited access to the OSHA Form 301 or its equivalent. See 29 CFR Part 1904.35, in OSHA's recordkeeping rule, for further details on the access provisions for these forms.

Number of Cases			
Total number of deaths	Total number of cases with days away from work	Total number of cases with job transfer or restriction	Total number of other recordable cases
(G) 0	(H) 0	(I) 0	(J) 0

Number of Days	
Total number of days away from work	Total number of days of job transfer or restriction
(K) 0	(L) 0

Injury and Illness Types			
Total number of ... (M)			
(1) Injuries	0	(4) Poisonings	0
(2) Skin Disorders	0	(5) Hearing loss	0
(3) Respiratory conditions	0	(6) All other illnesses	0

Establishment information

Your establishment name: Riverside Management Services Inc.

Street: 5955 Florida Mining Blvd West, Suite 305

City: Jacksonville State: FL ZIP: 32257

Industry description (e.g. Manufacture of motor truck trailers)

Standard Industrial Classification (SIC), if known (e.g. 3715)

OR

North American Industrial Classification (NAICS), if known (e.g. 336212)

Employment information (If you don't have these figures, see the Worksheet on the back of this page to estimate.)

Annual average number of employees: 39

Total hours worked by all employees last year: 26671

Sign here: Kelly Adams
Knowingly falsifying this document may result in a fine.

I certify that I have examined this document and that to the best of my knowledge the entries are true, accurate, and complete.

Kelly Adams HR Director
Company executive Title
Phone: 904-577-7700 x201 Date: 5/31/2023

Public reporting burden for this collection of information is estimated to average 28 minutes per response, including time for reviewing the instructions, searching existing data sources, gathering the data needed, and reviewing and revising the collection of information. Send comments regarding this burden estimate or any aspect of this collection of information, including suggestions for reducing this burden, to Washington, DC 20503, and send the completed form to the office.

OSHA's Form 300A (Rev. 01/2004)

Year 2 0 2 3
U.S. Department of Labor
Occupational Safety and Health Administration
Form approved OMB no. 1218-0178

Summary of Work-Related Injuries and Illnesses

All establishments covered by Part 1904 must complete this Summary page, even if no work-related injuries or illnesses occurred during the year. Remember to review the Log to verify that the entries are complete and accurate before completing this summary.

Using the Log, count the individual entries you made for each category. Then write the totals below, making sure you've added the entries from every page of the Log. If you had no cases, write "0".

Employees, former employees, and their representatives have the right to review the OSHA Form 300 in its entirety. They also have limited access to the OSHA Form 301 or its equivalent. See 29 CFR Part 1904.35, in OSHA's recordkeeping rule, for further details on the access provisions for these forms.

Number of Cases			
Total number of deaths	Total number of cases with days away from work	Total number of cases with job transfer or restriction	Total number of other recordable cases
(G) 0	(H) 0	(I) 0	(J) 0

Number of Days	
Total number of days away from work	Total number of days of job transfer or restriction
(K) 0	(L) 0

Injury and Illness Types			
Total number of ... (M)			
(1) Injuries	0	(4) Poisonings	0
(2) Skin Disorders	0	(5) Hearing loss	0
(3) Respiratory conditions	0	(6) All other illnesses	0

Establishment information

Your establishment name: Riverside Management Services Inc.

Street: 5955 Florida Mining Blvd West, Suite 305

City: Jacksonville State: FL ZIP: 32257

Industry description (e.g. Manufacture of motor truck trailers)

Standard Industrial Classification (SIC), if known (e.g. 3715)

OR

North American Industrial Classification (NAICS), if known (e.g. 336212)

Employment information (If you don't have these figures, see the Worksheet on the back of this page to estimate.)

Annual average number of employees: 40

Total hours worked by all employees last year: 64841

Sign here: Kelly Adams
Knowingly falsifying this document may result in a fine.

I certify that I have examined this document and that to the best of my knowledge the entries are true, accurate, and complete.

Kelly Adams HR Director
Company executive Title
Phone: 904-577-7700 x201 Date: 5/31/2023

Public reporting burden for this collection of information is estimated to average 28 minutes per response, including time for reviewing the instructions, searching existing data sources, gathering the data needed, and reviewing and revising the collection of information. Send comments regarding this burden estimate or any aspect of this collection of information, including suggestions for reducing this burden, to Washington, DC 20503, and send the completed form to the office.

**BARTRAM SPRINGS COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS FOR
AMENITY MANAGEMENT, FIELD OPERATIONS, AND MAINTENANCE SERVICES PROPOSAL
DECEMBER 6th, 2023**

OSHA's Form 300A (Rev. 01/2004)
Summary of Work-Related Injuries and Illnesses

Year 2023

U.S. Department of Labor
Occupational Safety and Health Administration
Form approved OMB no. 1218-0178

All establishments covered by Part 1904 must complete this Summary page, even if no work-related injuries or illnesses occurred during the year. Remember to review the Log to verify that the entries are complete and accurate before completing this summary.

Using the Log, count the individual entries you made for each category. Then write the totals below, making sure you've added the entries from every page of the Log. If you had no cases, write "0".

Employees, former employees, and their representatives have the right to review the OSHA Form 300 in its entirety. They also have limited access to the OSHA Form 301 or its equivalent. See 29 CFR Part 1904.35, in OSHA's recordkeeping rule, for further details on the access provisions for these forms.

Number of Cases			
Total number of deaths	Total number of cases with days away from work	Total number of cases with job transfer or restriction	Total number of other recordable cases
(G) 0	(H) 0	(I) 0	(J) 0

Number of Days	
Total number of days away from work	Total number of days of job transfer or restriction
(K) 0	(L) 0

Injury and Illness Types			
Total number of ... (M)			
(1) Injuries	0	(4) Poisonings	0
(2) Skin Disorders	0	(5) Hearing loss	0
(3) Respiratory conditions	0	(6) All other illnesses	0

OSHA reporting burden for this collection of information is estimated to average 15 minutes per response, including time for reviewing the instructions, searching existing data sources, gathering the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to Washington, DC 20543-0102 and the appropriate Office of Management and Budget, Paperwork Project Director (0304-0001). Send comments to the Office of Management and Budget, Paperwork Project Director (0304-0001).

Establishment Information	
Your establishment name:	Barttram Management Services Inc.
Street:	6955 Florida Mining Blvd West, Suite 205
City:	Jacksonville
State:	FL
ZIP:	32257
Industry description (e.g. Manufacture of motor truck trailers)	
Standard Industrial Classification (SIC), if known (e.g. 3715)	
OR	
North American Industrial Classification (NAICS), if known (e.g. 336212)	
Employment Information (if you don't have these figures, see the Worksheet on the back of this page to estimate.)	
Annual average number of employees	42
Total hours worked by all employees last year	0
Sign here:	<i>Kelly Adams</i>
Knowingly falsifying this document may result in a fine.	
I certify that I have examined this document and that to the best of my knowledge the entries are true, accurate, and complete.	
Company executive:	<i>Kelly Adams</i>
Title:	<i>HR Director</i>
Phone:	<i>904-777-7000 ext 201</i>
Date:	<i>12/31/2023</i>

OSHA's Form 300A (Rev. 01/2004)
Summary of Work-Related Injuries and Illnesses

Year 2023

U.S. Department of Labor
Occupational Safety and Health Administration
Form approved OMB no. 1218-0178

All establishments covered by Part 1904 must complete this Summary page, even if no work-related injuries or illnesses occurred during the year. Remember to review the Log to verify that the entries are complete and accurate before completing this summary.

Using the Log, count the individual entries you made for each category. Then write the totals below, making sure you've added the entries from every page of the Log. If you had no cases, write "0".

Employees, former employees, and their representatives have the right to review the OSHA Form 300 in its entirety. They also have limited access to the OSHA Form 301 or its equivalent. See 29 CFR Part 1904.35, in OSHA's recordkeeping rule, for further details on the access provisions for these forms.

Number of Cases			
Total number of deaths	Total number of cases with days away from work	Total number of cases with job transfer or restriction	Total number of other recordable cases
(G) 0	(H) 0	(I) 0	(J) 0

Number of Days	
Total number of days away from work	Total number of days of job transfer or restriction
(K) 0	(L) 0

Injury and Illness Types			
Total number of ... (M)			
(1) Injuries	0	(4) Poisonings	0
(2) Skin Disorders	0	(5) Hearing loss	0
(3) Respiratory conditions	0	(6) All other illnesses	0

OSHA reporting burden for this collection of information is estimated to average 15 minutes per response, including time for reviewing the instructions, searching existing data sources, gathering the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to Washington, DC 20543-0102 and the appropriate Office of Management and Budget, Paperwork Project Director (0304-0001). Send comments to the Office of Management and Budget, Paperwork Project Director (0304-0001).

Establishment Information	
Your establishment name:	Barttram Management Services Inc.
Street:	6955 Florida Mining Blvd West, Suite 205
City:	Jacksonville
State:	FL
ZIP:	32257
Industry description (e.g. Manufacture of motor truck trailers)	
Standard Industrial Classification (SIC), if known (e.g. 3715)	
OR	
North American Industrial Classification (NAICS), if known (e.g. 336212)	
Employment Information (if you don't have these figures, see the Worksheet on the back of this page to estimate.)	
Annual average number of employees	0
Total hours worked by all employees last year	0
Sign here:	<i>Kelly Adams</i>
Knowingly falsifying this document may result in a fine.	
I certify that I have examined this document and that to the best of my knowledge the entries are true, accurate, and complete.	
Company executive:	<i>Kelly Adams</i>
Title:	<i>HR Director</i>
Phone:	<i>904-777-7000 ext 201</i>
Date:	<i>12/31/2023</i>

**BARTRAM SPRINGS COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS FOR
AMENITY MANAGEMENT, FIELD OPERATIONS, AND MAINTENANCE SERVICES PROPOSAL
DECEMBER 6th, 2023**

Please state whether or not the Proposer or any of its affiliates are presently barred or suspended from bidding or contracting on any state, local, or federal contracts? Yes _____ No X
If yes, please. Provide:

The names of the entities _____ The state(s) where barred or suspended _____
The period(s) of debarment or suspension _____

Also, please explain the basis for any bar or suspension:

List any and all governmental enforcement actions (e.g., any action taken to impose fines or penalties, licensure issues, permit violations, consent orders, etc.) taken against the Proposer or its principals, or relating to the work of the Proposer or its principals, in the last five (5) years. Please describe the nature of the action, the Proposer's role in the action, and the status and/or resolution of the action.

No enforcement actions for the Proposer.

List any and all litigation to which the Proposer or its principals have been a party in the last five (5) years. Please describe the nature of the litigation, the Proposer's role in the litigation, and the status and/or resolution of the litigation.

Proposer has been named in various lawsuits for our CDD clients. In each of these occurrences, District Counsel for our client has been notified. Most often the District is also named as a party to the lawsuit and we communicate directly with the District Insurance, their claims team, and/or their assigned litigation counsel as defined in our Indemnification and notifications sections of our Management Agreements. The nature of such lawsuits ranges from slip-and-fall accidents in the community, to accidents alleged with District vendors. In these cases we provide periodic updates to all appropriate stakeholders so that they are aware of the current and planned status on litigation matters. Proposer is happy to discuss this matter in more detail if contracted for services.

**BARTRAM SPRINGS COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS FOR
AMENITY MANAGEMENT, FIELD OPERATIONS, AND MAINTENANCE SERVICES PROPOSAL
DECEMBER 6th, 2023**

4.C PRICING

Proposed Fee for Management and Staffing (This must include all proposed costs of):

Bartram Springs Fee Proposal As Requested In The RFP						
Fiscal Year 2024 (March to September, 2024)						
Position	Annual Hours	Wage	Gross	Burden	Total Fee	
General Manager	1,200	\$ 36.06	\$ 43,269	\$ 18,711	\$ 61,980	
Facility Manager/Lifestyle Director	1,200	\$ 24.04	\$ 28,846	\$ 15,284	\$ 44,130	
Field Operations Manager	1,200	\$ 28.85	\$ 34,615	\$ 16,655	\$ 51,270	
Sr. Guest Services Attendant	660	\$ 15.00	\$ 9,900	\$ 2,433	\$ 12,333	
Guest Services Attendant	2,050	\$ 15.00	\$ 30,747	\$ 6,470	\$ 37,217	
Fitness Center Monitor	840	\$ 20.00	\$ 16,800	\$ 3,769	\$ 20,569	
Sr. Maintenance Tech.	1,200	\$ 25.00	\$ 30,000	\$ 15,558	\$ 45,558	
Maintenance Tech.	600	\$ 25.00	\$ 15,000	\$ 5,095	\$ 20,095	
Lead Lifeguard	353	\$ 18.00	\$ 6,355	\$ 2,484	\$ 8,839	
Lifeguards	2,667	\$ 15.00	\$ 40,007	\$ 14,478	\$ 54,485	
Event Attendant	35	\$ 15.00	\$ 519	\$ 389	\$ 908	
Total	12,005		\$ 256,059	\$ 101,326	\$ 357,385	
Fiscal Year 2025						
Position	Annual Hours	Wage	Gross	Burden	Total Fee	
General Manager	2,080	\$ 36.06	\$ 75,000	\$ 32,433	\$ 107,433	
Facility Manager/Lifestyle Director	2,080	\$ 24.04	\$ 50,000	\$ 26,492	\$ 76,492	
Field Operations Manager	2,080	\$ 28.85	\$ 60,000	\$ 28,868	\$ 88,868	
Sr. Guest Services Attendant	1,144	\$ 15.00	\$ 17,160	\$ 4,218	\$ 21,378	
Guest Services Attendant	3,553	\$ 15.00	\$ 53,295	\$ 11,214	\$ 64,509	
Fitness Center Monitor	1,456	\$ 20.00	\$ 29,120	\$ 6,533	\$ 35,653	
Sr. Maintenance Tech.	2,080	\$ 25.00	\$ 52,000	\$ 26,968	\$ 78,968	
Maintenance Tech.	1,040	\$ 25.00	\$ 26,000	\$ 8,832	\$ 34,832	
Lead Lifeguard	612	\$ 18.00	\$ 11,016	\$ 4,305	\$ 15,321	
Lifeguards	4,623	\$ 15.00	\$ 69,345	\$ 25,095	\$ 94,440	
Event Attendant	60	\$ 15.00	\$ 900	\$ 674	\$ 1,574	
Total	20,808		\$ 443,836	\$ 175,632	\$ 619,468	
Fiscal Year 2026						
1.06						
Position	Annual Hours	Wage	Gross	Burden	Total Fee	
General Manager	2,080	\$ 38.22	\$ 79,500	\$ 34,378	\$ 113,878	
Facility Manager/Lifestyle Director	2,080	\$ 25.48	\$ 53,000	\$ 28,082	\$ 81,082	
Field Operations Manager	2,080	\$ 30.58	\$ 63,600	\$ 30,600	\$ 94,200	
Sr. Guest Services Attendant	1,144	\$ 15.90	\$ 18,190	\$ 4,471	\$ 22,660	
Guest Services Attendant	3,553	\$ 15.90	\$ 56,493	\$ 11,887	\$ 68,379	
Fitness Center Monitor	1,456	\$ 21.20	\$ 30,867	\$ 6,925	\$ 37,793	
Sr. Maintenance Tech.	2,080	\$ 26.50	\$ 55,120	\$ 28,586	\$ 83,706	
Maintenance Tech.	1,040	\$ 26.50	\$ 27,560	\$ 9,362	\$ 36,922	
Lead Lifeguard	612	\$ 19.08	\$ 11,677	\$ 4,563	\$ 16,240	
Lifeguards	4,623	\$ 15.90	\$ 73,506	\$ 26,601	\$ 100,107	
Event Attendant	60	\$ 15.90	\$ 954	\$ 714	\$ 1,668	
Total	20,808		\$ 470,466	\$ 186,170	\$ 656,636	
Fiscal Year 2027						
1.08						
Position	Annual Hours	Wage	Gross	Burden	Total Fee	
General Manager	2,080	\$ 41.28	\$ 85,860	\$ 37,129	\$ 122,989	
Facility Manager/Lifestyle Director	2,080	\$ 27.52	\$ 57,240	\$ 30,328	\$ 87,568	
Field Operations Manager	2,080	\$ 33.02	\$ 68,688	\$ 33,049	\$ 101,737	
Sr. Guest Services Attendant	1,144	\$ 17.17	\$ 19,645	\$ 4,828	\$ 24,473	
Guest Services Attendant	3,553	\$ 17.17	\$ 61,012	\$ 12,838	\$ 73,850	
Fitness Center Monitor	1,456	\$ 22.90	\$ 33,337	\$ 7,479	\$ 40,816	
Sr. Maintenance Tech.	2,080	\$ 28.62	\$ 59,530	\$ 30,872	\$ 90,402	
Maintenance Tech.	1,040	\$ 28.62	\$ 29,765	\$ 10,111	\$ 39,876	
Lead Lifeguard	612	\$ 20.61	\$ 12,611	\$ 4,928	\$ 17,539	
Lifeguards	4,623	\$ 17.17	\$ 79,386	\$ 28,729	\$ 108,115	
Event Attendant	60	\$ 17.17	\$ 1,030	\$ 771	\$ 1,802	
Total	20,808		\$ 508,103	\$ 201,063	\$ 709,167	

**BARTRAM SPRINGS COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS FOR
AMENITY MANAGEMENT, FIELD OPERATIONS, AND MAINTENANCE SERVICES PROPOSAL
DECEMBER 6th, 2023**

Event Planning: Please detail your vision for events that you plan to provide at Bartram Springs during the first year of the contract utilizing an annual budget of \$21,000 (inclusive of all event costs).

Event Title & Description (include which month event proposed to take place)	Month(s)	Estimated Cost
Kids Night	January, April, June	\$ 2,000.00
Craft Nights (Multiple)	February, September	\$ 1,500.00
Spring Event	March	\$ 2,500.00
Summer Lū'au	June	\$ 2,000.00
Mother's Day Paint & Sip	May	\$ 1,800.00
Independence Day Celebration	July	\$ 2,500.00
Back To School Celebration	August	\$ 2,500.00
Halloween Costume Contest	October	\$ 2,000.00
Fall Festival	November	\$ 1,200.00
December Holidays Event	December	\$ 3,000.00
(GMS is able to develop a Personalized Event Calendar for the CDD) TOTAL		\$ 21,000.00

Programs & CDD Revenue Share: Please describe all fee-based programming (athletics, fitness classes, camps, lessons, etc.) that you plan to provide at Bartram Springs during the first year of the contract and proposed revenue share (%) with the CDD and estimated total annualized \$.

Program	Description	CDD Revenue Share %	Estimated Annualized CDD Revenue share \$
Revenue Sharing Models	<p>GMS does not utilize revenue cost-sharing models.</p> <p>We prefer to contract with outside vendors to provide specialized services, i.e. fitness classes, sports programs, etc.</p> <p>In this scenerio, all excess revenue goes to the CDD for any fees collected not paid directly to the vendor(s).</p>	Not Applicable	Not Applicable

**BARTRAM SPRINGS COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS FOR
AMENITY MANAGEMENT, FIELD OPERATIONS, AND MAINTENANCE SERVICES PROPOSAL
DECEMBER 6th, 2023**

Program References: Provide examples of programs that your firm is currently providing to other similar-sized communities (what have you done elsewhere).

Program	Community Name	Total # of Households Occupied	Total Annual Participants	Total Revenue Provided to the CDD/HOA
See Above				

Programs & CDD Revenue Share: Please describe all fee-based programming (athletics, fitness classes, camps, lessons, etc.) that you plan to provide at Bartram Springs during the first year of the contract and proposed revenue share (%) with the CDD and estimated total annualized \$.

Event Title & Description (include date of event and community name)	Total # of Households Occupied	# of Participants	Cost
See Above			

**BARTRAM SPRINGS COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS FOR
AMENITY MANAGEMENT, FIELD OPERATIONS, AND MAINTENANCE SERVICES PROPOSAL
DECEMBER 6th, 2023**

5. ALTERNATIVE PROPOSAL

IF THE PROPOSER DESIRES TO PROPOSE AN ALTERNATE APPROACH TO OPERATING AND MAINTAINING THE DISTRICT'S FACILITIES, THE PROPOSER IS STRONGLY ENCOURAGED TO SUBMIT BOTH A PROPOSAL RESPONSIVE TO THE STRUCTURE OUTLINED HEREIN AND A SEPARATE, ALTERNATIVE PROPOSAL. PROPOSER IS ENCOURAGED TO PROVIDE AS MUCH DETAIL AS POSSIBLE REGARDING THE ALTERNATIVE, INCLUDING, BUT NOT LIMITED TO, STAFFING, FEE STRUCTURES, DIFFERENT OR ADDITIONAL SCOPE OF SERVICES, DIFFERENT OR ADDITIONAL JOB DESCRIPTIONS, AND COSTS.

Bartram Springs Fee Proposal - Alternative Staffing Model						
Fiscal Year 2024 (March to September, 2024)						
Position	Employee Name	Annual Hours	Wage	Gross	Burden	Total Fee
General Manager	Terry Glynn	520	\$ 50.00	\$ 15,000	\$ 6,487	\$ 21,487
Amenity Manager/Lifestyle Director	Leah Tincher	2,080	\$ 36.06	\$ 43,269	\$ 18,711	\$ 61,980
Field Operations Manager	Chip Dellinger	2,080	\$ 28.85	\$ 34,615	\$ 16,655	\$ 51,270
Sr. Guest Services Attendant	Laurie Hogan	1,144	\$ 15.00	\$ 9,900	\$ 2,433	\$ 12,333
Guest Services Attendant	John Wright	3,553	\$ 15.00	\$ 30,747	\$ 6,470	\$ 37,217
Fitness Center Monitor	Art Holms	1,456	\$ 20.00	\$ 16,800	\$ 3,769	\$ 20,569
Maintenance Tech.	Tyler Maason	2,080	\$ 25.00	\$ 30,000	\$ 15,558	\$ 45,558
Lead Lifeguard	Seasonal Hires	612	\$ 18.00	\$ 6,355	\$ 2,484	\$ 8,839
Lifeguards	Seasonal Hires	4,623	\$ 15.00	\$ 40,007	\$ 14,478	\$ 54,485
Event Attendant	Emily Wright	60	\$ 17.17	\$ 594	\$ 445	\$ 1,039
Total		18,208		\$ 227,288	\$ 87,489	\$ 314,778
					Savings	11.9%
Fiscal Year 2025						
Position	Employee Name	Annual Hours	Wage	Gross	Burden	Total Fee
General Manager	Terry Glynn	520	\$ 50.00	\$ 26,000	\$ 11,243	\$ 37,243
Amenity Manager/Lifestyle Director	Leah Tincher	2,080	\$ 36.06	\$ 75,000	\$ 32,433	\$ 107,433
Field Operations Manager	Chip Dellinger	2,080	\$ 28.85	\$ 60,000	\$ 28,868	\$ 88,868
Sr. Guest Services Attendant	Laurie Hogan	1,144	\$ 15.00	\$ 17,160	\$ 4,218	\$ 21,378
Guest Services Attendant	John Wright	3,553	\$ 15.00	\$ 53,295	\$ 11,214	\$ 64,509
Fitness Center Monitor	Art Holms	1,456	\$ 20.00	\$ 29,120	\$ 6,533	\$ 35,653
Maintenance Tech.	Tyler Maason	2,080	\$ 25.00	\$ 52,000	\$ 26,968	\$ 78,968
Lead Lifeguard	Seasonal Hires	612	\$ 18.00	\$ 11,016	\$ 4,305	\$ 15,321
Lifeguards	Seasonal Hires	4,623	\$ 15.00	\$ 69,345	\$ 25,095	\$ 94,440
Event Attendant	Emily Wright	60	\$ 17.17	\$ 1,030	\$ 771	\$ 1,802
Total		18,208		\$ 393,966	\$ 151,648	\$ 545,615
					Savings	11.9%
Fiscal Year 2026						
1.06						
Position	Employee Name	Annual Hours	Wage	Gross	Burden	Total Fee
General Manager	Terry Glynn	2,080	\$ 13.25	\$ 27,560	\$ 11,918	\$ 39,478
Facility Manager/Lifestyle Director	Leah Tincher	2,080	\$ 38.22	\$ 79,500	\$ 34,378	\$ 113,878
Field Operations Manager	Chip Dellinger	2,080	\$ 30.58	\$ 63,600	\$ 30,600	\$ 94,200
Sr. Guest Services Attendant	Laurie Hogan	1,144	\$ 15.90	\$ 18,190	\$ 4,471	\$ 22,660
Guest Services Attendant	John Wright	3,553	\$ 15.90	\$ 56,493	\$ 11,887	\$ 68,379
Fitness Center Monitor	Art Holms	1,456	\$ 21.20	\$ 30,867	\$ 6,925	\$ 37,793
Sr. Maintenance Tech.	Tyler Maason	2,080	\$ 26.50	\$ 55,120	\$ 28,586	\$ 83,706
Maintenance Tech.	Seasonal Hires	1,040	\$ 11.23	\$ 11,677	\$ 4,563	\$ 16,240
Lead Lifeguard	Seasonal Hires	612	\$ 120.11	\$ 73,506	\$ 26,601	\$ 100,107
Lifeguards	Emily Wright	4,623	\$ 0.24	\$ 1,092	\$ 818	\$ 1,910
Total		20,748		\$ 417,604	\$ 160,747	\$ 578,352
					Savings	11.9%
Fiscal Year 2027						
1.08						
Position	Employee Name	Annual Hours	Wage	Gross	Burden	Total Fee
General Manager	Terry Glynn	2,080	\$ 14.31	\$ 29,765	\$ 12,871	\$ 42,636
Facility Manager/Lifestyle Director	Leah Tincher	2,080	\$ 41.28	\$ 85,860	\$ 37,129	\$ 122,989
Field Operations Manager	Chip Dellinger	2,080	\$ 33.02	\$ 68,688	\$ 33,049	\$ 101,737
Sr. Guest Services Attendant	Laurie Hogan	1,144	\$ 17.17	\$ 19,645	\$ 4,828	\$ 24,473
Guest Services Attendant	John Wright	3,553	\$ 17.17	\$ 61,012	\$ 12,838	\$ 73,850
Fitness Center Monitor	Art Holms	1,456	\$ 22.90	\$ 33,337	\$ 7,479	\$ 40,816
Sr. Maintenance Tech.	Tyler Maason	2,080	\$ 28.62	\$ 59,530	\$ 30,872	\$ 90,402
Maintenance Tech.	Seasonal Hires	1,040	\$ 12.13	\$ 12,611	\$ 4,928	\$ 17,539
Lead Lifeguard	Seasonal Hires	612	\$ 129.72	\$ 79,386	\$ 28,729	\$ 108,115
Lifeguards	Emily Wright	4,623	\$ 0.26	\$ 1,180	\$ 883	\$ 2,063
Total		20,748		\$ 451,013	\$ 173,607	\$ 624,620
					Savings	11.9%



EXHIBIT "B" – RFP Questions

REQUEST:

Provide details regarding the benefits you provide your employees (please differentiate between PT and FT)

ANSWER:

GMS offers robust employer-paid benefits to full-time (>30 hours a week) associates including 100% paid employee healthcare, dental, disability, life insurance, 401K, Gap hospitalization insurance, 10 Days of PTO for first-year associates increasing to 15 Days of PTO after their first year of employment and 10 paid holidays. Part-time (<=30 hours a week) associates receive paid holidays and other key benefits.

This is a key component of our outstanding GMS staffing retention rates and is cited as key feedback from our client satisfaction and sentiment surveys.



Governmental Management Services

EXHIBIT "B" – RFP Questions

REQUEST:

Provide resumes/profiles for all proposed salaried (General Manager, Field Operations Manager, Facility Manager/Lifestyle Director, etc.) onsite staff and those providing direct corporate support.

ANSWER:

See attached resumes.

TERENCE M GLYNN

ISA Certified Arborist (FL0289) | Consulting Horticulturist | ISA member since 1997

Education

- Niagara University, 1985-1989

Experience

Arborist, Duke Gardens

- Somerville, NJ, 1990-1996

Owner, Glynn Environmental

Coral Springs, FL, 1997-2022

- Clients: HOA, Commercial and Governmental
- Consultant to Sun Bahama Ltd.; Projects: Atlantis and Ocean Club, Nassau
- Dade county roads and bridges department
- Hurricane expert for El San Juan and El Conquistador Resorts Puerto Rico
- Hurricane expert/responder: Hurricanes Floyd, Charley, Jean, Frances, Georges

Owner, IGM LLC

Margate, FL, 2008-2021

- Clients: Governmental, Industrial, HOA and Private Estates
- 160 employees and affiliated sub-contractors
- Specialized government maintenance and consulting for cities, counties and state agencies
- Large project specialist for landscape maintenance and planning
- Builder representative on building/zoning projects

COO, Shinto Landscaping

Deerfield Beach, FL, 2021-2022

Leah Tincher

Contact 11502 Eagle Crest Lane
Jacksonville, FL 32258
(904) 874-5339 (Cell)
Email: lbtincher@yahoo.com

Objective An experienced property management professional that desires to utilize my extensive experience and leadership abilities in the Amenity Management, Aquatics and Recreation fields.

Experience October 2022 to October 2023
April 2016 to August 2019
Riverside Management Services Jacksonville, FL

Amenity Manager – St John’s Golf & Country Club

- Oversee all aspects of the operation of the community amenities, assisting residents in use of the facilities, including pool, athletic fields and fitness center;
- Plan and implement community activities, including camp during the summer months for children in the community; plan and implement special holiday events within budget constraints
- Manage staff members.

September 2013 to March 2016
Vesta Property Services Jacksonville, FL

Amenity Manager – Durbin Crossing

- Oversee all aspects of the operation of the community amenities, assisting residents in use of the facilities, including pool, athletic fields and fitness center;

April 2006 to August 2013
Jacksonville Golf & Country Club Jacksonville, FL

Aquatics Manager

Aquatics & Activities Director

- Responsible for operation of community pool including lifeguard supervision and leadership of club swim team;
- Also responsible for all youth activities for the club

August 1997 to May 2008

Teacher/Coach

Jacksonville, FL

- Taught courses in elementary, middle school and high school Physical Education, Health and Wellness, Speech Communication and Life Management
- Served as Head Coach for Varsity Boys and Girls Swimming and Diving teams, as well as other sports.

EDUCATION **Indiana University – B. S. Education**

Christian G. Dellinger

1744 W Holly Oaks Lake Rd • Jacksonville, Florida 32225

Cell 904.631.5135 • dellinger@gmail.com

Objective

To provide a world class client experience through demonstration of managing high-value accounts, percipient market and trading knowledge, and aligning plans to meet client and organizational goals.

Skills

- Converting service into sales opportunities
- Guiding clients through difficult processes
- Building a meaningful client/broker relationship
- Mutual fund, equity, and options trading proficient

Professional Experience

Fidelity Investments (Jacksonville, Florida) **10/2017- Current**

Service/High Net Worth Representative

Implementing Fidelity's CSS model to deliver efficient and effective service. Continued relationship development delivered through robust product knowledge, personalized client care, and adding additional value beyond clients stated needs. Demonstrates expert understanding of all of Fidelity's personal investment retirement accounts. Never intimidated when faced with difficult situations/clients.

Genesee & Wyoming Railroad Services Inc. (Jacksonville, Florida) **07/2011 – 9/2016**

Revenue Protection Specialist

Implemented processes to eliminate waste and capture missed revenue potential. Integrated business intelligence systems as a check and balance to ensure accuracy. Collaborated with operations management to streamline revenue automation for new services. Created, distributed, and managed invoices for over thirty-five railroad customers.

Regional Operations Support Specialist

Two-time employee of the month recipient. Built meaningful and beneficial business relationships with over forty rail customers. Harmonized customer needs with railroad management and operations crews. Instrumental in the launch of a new customer service portal for rail customers (ShipperConnect).

Education

University of North Florida - Jacksonville, Florida

Bachelor of Business Administration-Marketing, Graduated 2011

Currently series 7 and 63 licensed, pursuing 66 license

LAURIE HOGAN

563-249-7818

jakeynoses1@gmail.com

1220 Redcliffe Lane
St. Augustine, FL
32095

Objective

To use my skills and life experiences to expand my employment into new arenas, and utilizing those skills to the benefit of my employer and clients.

Experience

May Management Services, St. Augustine, FL April 2018 - Nov. 2020

Amenity Center Manager for The Cascades @ World Gold Village Oversee the Clubhouse, Fitness Center, and Sports Complex for Active Adult 55+ Community, ensuring a 5 Star presence and that the needs of the HOA Board of Directors, community residents and their guests are met with excellent customer service. Work with contractors and vendors, taking bids, and managing projects from inception until completion. Responsible for monthly community newsletter, all community activities, and giving direction to maintenance, housekeeping, and event coordinator.

New Age Real Estate, Clinton, IA Jan. 2015 - Dec. 2017

Licensed realtor in the state of Iowa. Focus was on building relationships with clients; assisted in all aspects in the selection, purchase, and sale of homes.

Camanche Comm. School District, Camanche, IA Aug. 2008 - May 2014

Family and Consumer Science Teacher Grades 7-12

Responsible for lesson planning and implementation of plans to ensure student learning. Classes taught included Foods 1, Foods 2, Creative Cuisine, Professional Foods, Independent Living, and 7th Grade Introductory Foods.

Clinton Community School District, Clinton, IA Aug. 2004 - May 2008

Family and Consumer Science Teacher Grades 9-12

Responsible for lesson planning and implementation of plans to ensure student learning. Classes taught included Foods I, II, and III, Meal Management, Independent Living, and Housing and Home Furnishings.

Education

University of Northern Iowa, Cedar Falls, IA 50613 Aug. 1974 - May 1978

B.A. Vocational Home Economics

Iowa State University, Ames, IA 50011 Aug. 1985 - Dec. 1985

15 graduate hours in business and home economics

Skills

My biggest strength is building relationships. My past success in my various positions has always come from being a good listener and putting the wants and needs of others at the forefront of the task at hand.

I am very organized and always look for an opportunity to learn new things and put those ideas into practice.

References Available Upon Request

John Gibson Wright III

Jgwright0915@gmail.com | (914)602-7269

Experience

Riverside Management Services (Jacksonville, FL) April 2021 – Present
Amenity Center Attendant/Party Attendant/Pool Deck Attendant/Kayak Attendant

- Greet residents, answer phone calls, address concerns and issues of residents and guests
- Enforce District policies and rules
- Maintain the pool deck, parking lot, all courts and fields
- Book private events and have paper work complete and deposits collected
- Maintain bathrooms, gym and meeting room to make sure neat and tidy
- Remove debris from around amenity and check and changed trash receptacles
- Assist Manager during events and complete any tasks left by manager

Bartram Trail High School Lacrosse Coach August 2023 – Present
Goalie/Defensive Coach

- Run practice with the goalies to sharpen skills
- Work with defense and goalies to execute plays
- Work with Head Coach and other coaches to have successful team

Sampson Creek Community Development District (St. Augustine, FL) Summers 2020 – 2023
Assistant Head Camp Counselor (2023) Co-Head Camp Counselor (2022) Camp Counselor 2020, 2021)

- Executed daily operations, crafts, and weekly field trips.
- Collaborated with counselors to coordinate major activities.
- Planned and executed daily sport activities.

Education

University of North Florida (Jacksonville, FL) August 2023 – Present
Studying Sports Management

Bartram Trail High School August 2019 – May 2023

Skills

- First Aid/CPR & AED Trained
- Microsoft Office Suite
- Strong Technology Skills
- Athletic
- Research
- Team Player
- Problem-Solving
- Professional Nature
- Maintenance Skills

Tyler Mason

Professional summary

Completed an 11-month Hvac program at Florida State College at Jacksonville in the HVAC/R certification program. Experienced with heat pumps, furnaces, troubleshooting, electrical wiring, preventative maintenance and have a clean driving record. Seeking a beginner HVAC Technician or install position

Employment history

Industrial Refrigeration Technician

First Call Refrigeration, Jacksonville, Florida — Oct, 2023 - Nov, 2023

Maintained and repaired freezer/condenser units.

Completed work orders and timesheets weekly for work that was completed.

Landscaper

Self Employed — Apr, 2020 - Jul, 2022

- Managed multiple properties during the summer and fall while in high school.
- Mowed lawns, bagged leaves and laid mulch

Education

Florida State College at Jacksonville, Jacksonville, Florida — 2022 - 2023

HVAC/R certification program. Some courses include: electrical wiring, troubleshooting, service practices, fundamentals of HVAC and refrigeration

George Washington High School, Charleston, West Virginia — 2018 - 2022

Licenses

EPA Universal 608

Esco Group

OSHA 30 hour

OSHA

NATE Ready to work

NATE

Contact information

Fernandina Beach, United States, 32034

tylerwmason123@outlook.com

304-419-8501

Skills

Communication

Troubleshooting

Problem Solving

Customer Service

Reliability



EXHIBIT "B" – RFP Questions

REQUEST:

Describe and provide examples of your approach to resident engagement: (eblasts, mobile apps, website, surveying, social media, newsletters, etc.)

ANSWER:

GMS prides itself on the ability to proactively communicate with our CDD residents using a variety of mediums. Attached are some example communications (emails, newsletters, etc.) for review.

Please also refer to Pages 10-14 in our Proposal for additional insights.

From: Island Club deerrunmgr@rmsnf.com
Subject: Weekly Activity Reminder
Date: January 12, 2024 at 9:11 AM
To: amossing@gmstnn.com



Grand Reserve



Good morning Grand Reserve Residents,

Your **Grand Reserve Upcoming Weekly Activities** Reminder.

Have a Happy Friday and a wonderful weekend!

Kind Regards,
Kayla Rinker

Grand Reserve Upcoming Weekly Activities

January 14 – January 20

SUN. 14 January	8:30am Pickleball 4pm–6pm Grand View Drive Potluck 6pm Card Game Night FULL (Upstairs) 7pm Diamond Painting (Downstairs)
MON. 15 January	8:30am Pickleball 10am Bocce Ball 3pm LCR 2 6pm Monday Night Turbo Upstairs 7pm Pickleball

TUES. 16

January

6:15pm Stone Cold Poker

WED. 17

January

8:30am Pickleball
10am Bocce Ball
10:45am Zumba With Nancy
5:45 ladies Poker
7pm Pickleball

THURS. 18

January

6:30pm Bunco FULL

FRI. 19

January

8:30am Pickleball
9am Zumba Tone Nancy
10am Zumba With Nancy
11am Quilting
4pm Happy Hour (BYOB)
6pm Poker Upstairs
6:30pm Paint Night

SAT. 20

January

8:30am Pickleball
6:30pm LCR FULL

STAY CONNECTED

GRAND RESERVE AMENITY CENTER | | DeerRunMgr@rmsnf.com
(386)263-7213



STAY CONNECTED

Island Club | 501 Grand Reserve Dr. , Bunnell, FL 32110

Unsubscribe_amosing@gmstnn.com

[Update Profile](#) | [Constant Contact Data Notice](#)

ContactUs@rmsnf.com

Sent by aeerrunmgr@rmsnr.com powered by



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Newsletter January 2024

[View as Webpage](#)



Happy New Year!
We wish you a joyful and prosperous new year.

We will begin taking down the holiday lights on January 2nd and work for as many days as necessary to take everything down and get it properly stored away for next year. If you would like to volunteer to help, please email ameliawalkmanager@gmsnf.com, or stop by the office on January 2nd.

If you have any comments, questions or requests, please feel free to stop by the office.

*Your Amenity & Operations Manager,
Kelly Mullins*

Here are the latest events happening at the Amelia Walk Amenity Center

These dates are subject to change based on new rentals

Amenity Center January Calendar



Don't miss out on the yummy food trucks
coming to Amelia Walk every Tuesday from
5pm - 8pm!

Upcoming Food Trucks:

January 2nd: What's the Catch

January 9th: Mama's Food

January 16th: Twisted Okie BBQ & Tacos

January 23rd: 904 Gyros

January 30th: Planet Pizza



January Exercise Classes Schedule

Zumba

Mondays and Wednesdays at 9am

Zumba Toning

Fridays at 9am

\$5 per class

No class Monday, January 1st

Slow Flow Yoga

Tuesdays and Thursdays at 8:45am

Wednesdays at 6pm beginning January 10th!

Chair Yoga

Tuesdays at 4pm

\$10 per class

Local Events



New Year's Eve Shrimp Drop

Join the City of Fernandina Beach and Light Up Amelia for a unique, family-friendly New Year's celebration! Ring in the new year at the downtown waterfront in conjunction with the Greenwich Mean Time stroke of midnight (7PM). Enjoy holiday food, drinks and party favors all leading up to the dropping of the LED-lighted shrimp followed by FIREWORKS.

For information about upcoming events in Amelia Island, be sure to check out the Amelia Island Events Calendar
<https://www.ameliaisland.com/Calendar>



CDD Information

The next CDD meeting will be held on Tuesday, January 16th, 2023, at 6:00 p.m. at the Amelia Walk Clubhouse.

If you have any questions about CDD ponds or landscaping, please feel free to contact our Amenity & Operations Manager, Kelly Mullins, at ameliawalkmanager@gmsnf.com

Looking for information about your CDD? Please check out our CDD website for lots of helpful information.
www.ameliawalkcdd.com



**Amenity Center Office Hours
Monday - Friday 9am - 5pm**

**Please note the Amenity Center office will be closed on
Monday, January 1st, in observance of New Year's Day.**

Kelly Mullins, Amenity & Operations Manager
Amelia Walk CDD
(904) 225-3147
ameliawalkmanager@gmsnf.com

Amelia Walk CDD | 85287 Majestic Walk Boulevard , Fernandina Beach, FL 32034

[Unsubscribe amossing@gmstnn.com](mailto:amossing@gmstnn.com)

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Sent by ameliawalkmanager@gmsnf.com powered by



Try email marketing for free today!

From: Amelia Walk CDD ameliawalkmanager@gmsnf.com
Subject: An Update from your CDD Board Chairman
Date: December 31, 2023 at 10:01 AM
To: amossing@gmstnn.com



Amelia Walk
Community Development District
Chairman Update – December 31, 2023

2023 Year in Review

It's been a busy year for the Amelia Walk Community Development District. The staff and district board of supervisors have been busy working to make the Amelia Walk Community a wonderful place to live.

I wanted to share with the community some of the accomplishments this past calendar year.

- Holiday lights work group was formed in January. We met a few times and developed an action plan with the documented design of what the holiday lights for 2023 would be.
- The pool got a deep cleaning to address the black algae and much needed repairs were done in January.
- Upgraded pool equipment, installed new storage sheds, a new 375-gallon chlorine tank and secured the equipment area with a gated fence.
- In February the district approved LED lights on main entrance tower and Amenity Center for holiday lighting and overall night time lighting. Installation took place in early March.
- New pond maintenance company, Solitude, started in March.
- In March a Capital Reserve projects survey was conducted for the entire resident community to provide input on 25 projects to provide guidance for the board. It was decided to move forward with the top 5 projects and a few others.
- Haul road -Trails policy approved and in place in April, with on going projects such as gates, signage, and access controls.
- Events: Spring Festival -Easter egg hunt, The Summer Luau, a Fall Festival, the September Vendor Market place and Breakfast with Santa.
- Automated with alerts pool chemical feeder controllers were installed.
- The pool maintenance company hired last year resigned, a new one was selected but would not sign our contract and gave notice as such, the day before they were to start. Due to quick action by the staff we were able to hire another company starting July 1st and they have been exceptional keeping the pool well maintained.
- New landscape maintenance company Brightview started in July. Initially there

were many startup issues but since mid September performance improved. Staff is working very closely with them to insure acceptable service.

- Solar powered lights were installed on three CBU Mailboxes in May and June.
- Flagpole with lights was installed in August and September.
- Tennis courts resurfacing was planned but was enhanced to convert one of the two tennis courts to four pickle ball courts.
- A 10ft fence on tennis court replaced the 3 foot section of fence.
- Added FOB security for pickleball and tennis courts.
- Upgraded Amenity Center CCTV security systems.
- All phase one roads re-milling and repairs financing approved and implemented. Expectation is to have signed contracts in January. Repairs will be done first followed by the re-milling/paving.
- Resident driven holiday lights displays planned back in March was implemented and operational by November 12th.
- Main entrance signs were painted and monument signs throughout the community were repaired and painted. The two trellises on Majestic Walk Blvd. were also repaired and painted.
- 5 Benches installed on ponds in the community in November.
- Installed pool water solar panels in December. Pool water temp was 50 degrees on December 20th before turn on and by Christmas it was 63 degrees. Will be monitoring the temperature but expectation is to get about 10 degrees warmer than the average daily temperature. Maybe more on the real sunny days. If the water gets over 90 degrees it will reverse to cool the water. Time will tell how this system performs.

Happy New Year and enjoy the upcoming New Year.

Regards,

Jeffrey E. Robinson
Chairman Board of Supervisors
Amelia Walk CDD
770-990-0957
awcdd.jeffrobinson@gmail.com

Amelia Walk CDD | 85287 Majestic Walk Boulevard , Fernandina Beach, FL 32034

[Unsubscribe amossing@gmstnn.com](mailto:amossing@gmstnn.com)

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Sent by ameliawalkmanager@gmsnf.com powered by



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Greyhawk CDD

Monthly CDD Meeting

To: Alison Mossing

December 12, 2023 at 1:10 PM



This message is from a mailing list.

Unsubscribe



CDD MEETING

12-14-2023

3:30 PM

@ Plantation Oaks Amenity Center



If you ever have any questions or need any advice, don't hesitate to touch base with me.

Sincerely,

Ryan Wilson
Facility Manager
(904) 203-7112

Greyhawkmanager@gmsnf.com



Deer Run FY23 EVENT BUDGET

BUDGET \$13,000

Events from October 2022-September 2023

<u>EVENT</u>	<u>ANNUAL BUDGET</u>	<u>Actuals</u>	<u>Event Month</u>	<u>Event Date</u>
Kids Night	\$ 200.00	\$ 184.57	November	11.08.23
Fall Festival	\$ 500.00	\$ 433.39	November	11.12.22
CHRISTMAS Event	\$ 2,000.00	\$ 1,668.47	December	12.10.22
SPRING (EASTER)	\$ 1,200.00	\$ 1,129.62	April	04.01.23
Mother's Day Paint & Sip	\$ 500.00	\$ -	May	TBD
INDEPENDENCE DAY	\$ 1,000.00	\$ -	July	TBD
TBD	\$ 2,500.00			
Craft Nights	\$ 1,800.00	\$ 669.96	Monthly	
Bingo Nights	\$ 3,000.00	\$ 1,235.14	Monthly	
Total	\$12,000	\$4,703		

AMELIA WALK FY23 EVENT SCHEDULE

BUDGET \$10,000

Events from October 2022-September 2023

<u>EVENT</u>	<u>ANNUAL BUDGET</u>		
OKTOBERFEST	\$1,200	October	Oct 15th 6pm-9pm
HALLOWEEN	\$500	October	TBD
SANTA	\$1,000	December	TBD
CHRISTMAS ADULT SOCIAL	\$300	December	TBD
SPRING (EASTER)	\$1,000	March/April	TBD
SUMMER KICK OFF	\$1,500	June	TBD
INDEPENDENCE DAY	\$500	July	TBD
LUAU	\$2,000	June/July	TBD
BACK TO SCHOOL	\$1,500	August	TBD
WINE NIGHTS	\$500	Two events (fall and spring)	TBD
	\$10,000		



EXHIBIT "B" – RFP Questions

REQUEST:

Provide examples of recent Board Reporting for similar-sized communities. (Amenity Manager Report, Lifestyle Report, Event Recap, Project Trackers, etc.)

ANSWER:

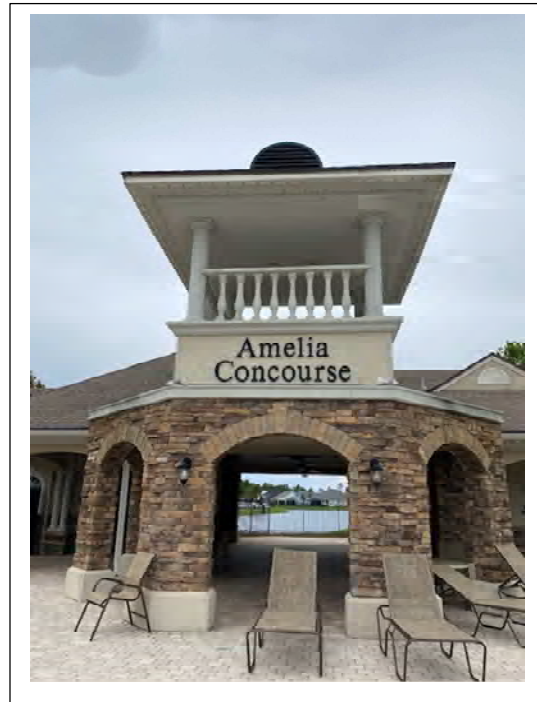
See the attached example management reports. Our Field Managers and Amenity Managers routinely attend monthly CDD meetings to answer questions as well.

1/16/2024

Amelia Concourse

Community Development District

Amenity Management & Field Operations Report



Chip Dellinger

FIELD OPERATIONS MANAGER
GOVERNMENTAL MANAGEMENT
SERVICES

Amelia Concourse
Community Development District

Amenity & Field Operations Report
January 16, 2024

To: Board of Supervisors

From: Chip Dellinger
Field Operations Manager

RE: Amelia Concourse Amenity & Field Operations Report

The following is a summary of items related to the amenity center, field operations & maintenance of Amelia Concourse CDD.


Communication

- Any resident questions or concerns can be submitted by email to Acmanager@gmsnf.com
 - Any resident that needs to request an access card should reach out to above email. Many new residents have been doing so- the CDD email on the information center at the front of the community seems effective.
 - Going forward, GMS will provide a monthly newsletter email blast on months CDD meetings are not held in an effort to increase communication and transparency with residence.

Special Events

- GMS looks forward to working with the Amelia Concourse Board of Supervisors and residents of the community to hold events that would be desired in this district at the direction of the Board of Supervisors.
 - ☑ Potential Events:
 - Pool deck yoga starting in the spring
 - Community BBQ competition
 - Aqua Zumba starting in the spring
 - Easter egg hunt

December Special Events

A blue poster for the Amelia Concourse Holiday Golf Cart Parade. The background features a large, light blue snowflake graphic at the top and smaller snowflakes scattered throughout. The text is centered and includes the event name, a list of activities, the date and time, and two paragraphs of descriptive text.

Amelia Concourse
**HOLIDAY GOLF
CART PARADE**

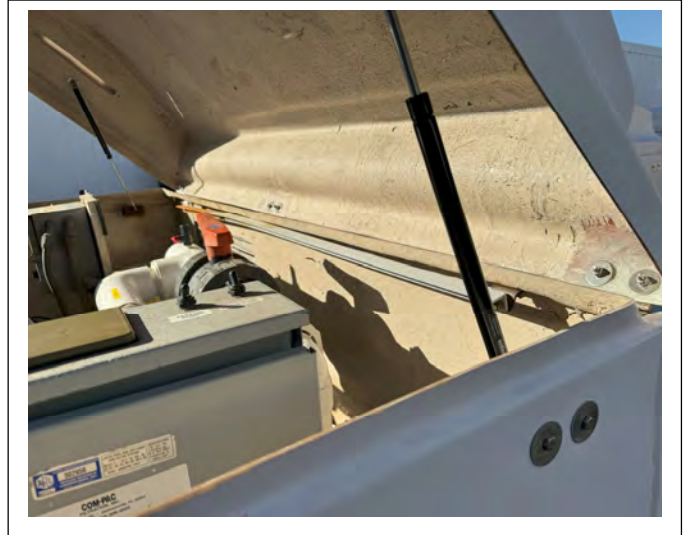
Family • Fun • Food • Music • Dance

December 23rd • 5:30pm

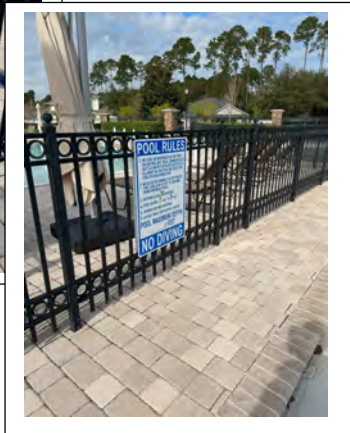
We will meet at the Gladiolus cul de sac at 5:30 to start the parade. The parade will make its way through the community and finish at the amenity center for hot chocolate and cookies around 6:30. This event is open to all residents of Amelia Concourse.

Good afternoon, in an abundance of caution I want to send clarification regarding tomorrow's resident only event. Participation is at your own risk and remains subject to all existing amenity policies. Further, this event is not a cdd sponsored or endorsed event, it is merely an informal event of Amelia Concourse residents. Happy Holidays!

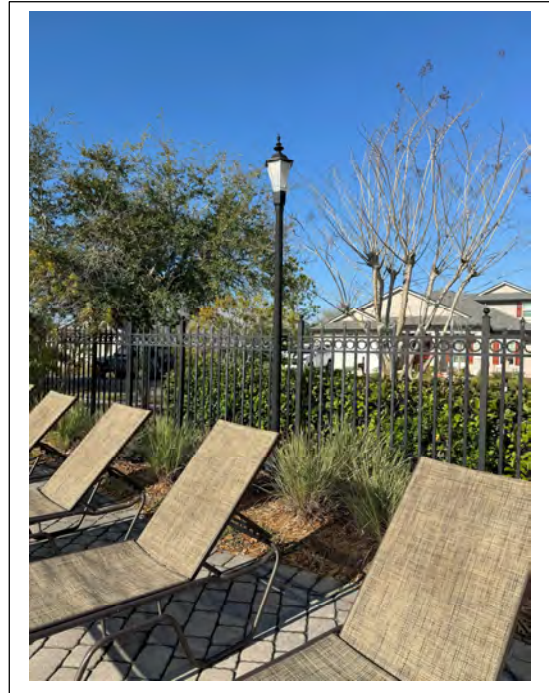
Completed Projects – Pool Equipment



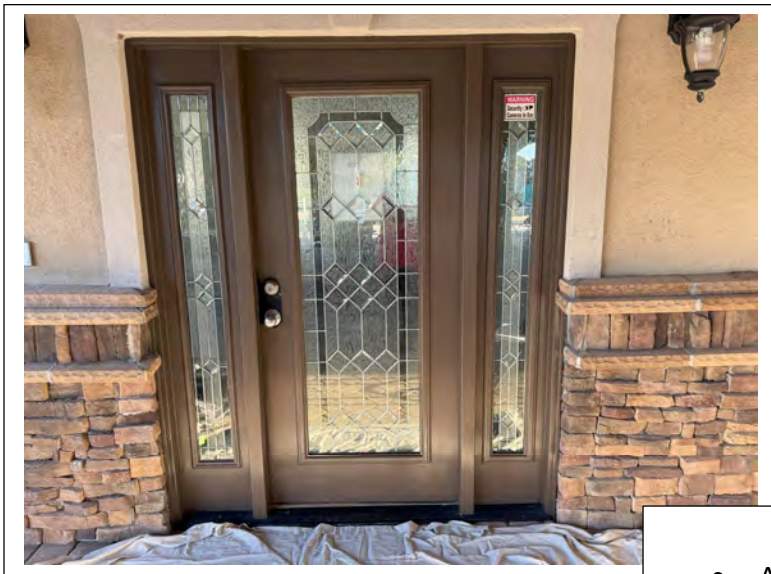
- More pool pac repairs have been repaired with fiberglass, new hardware, and gas shocks.
- Pool rules signs have been updated.



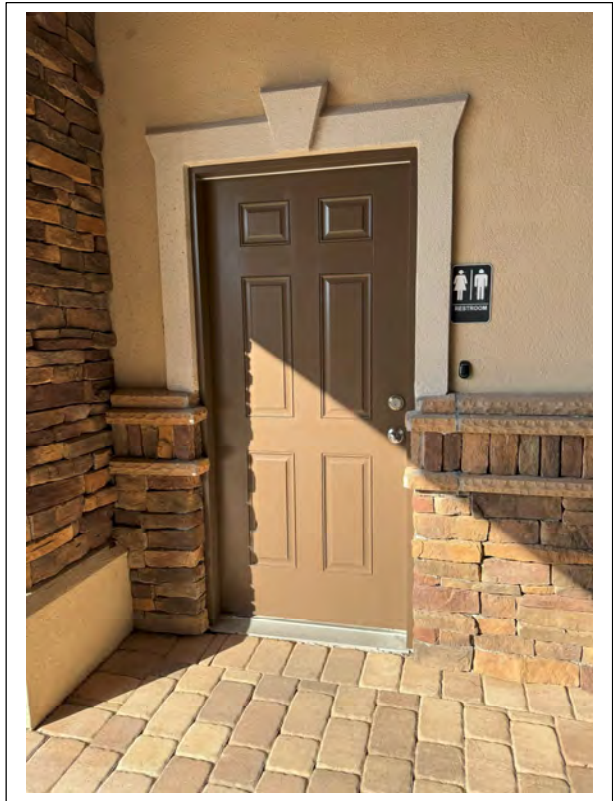
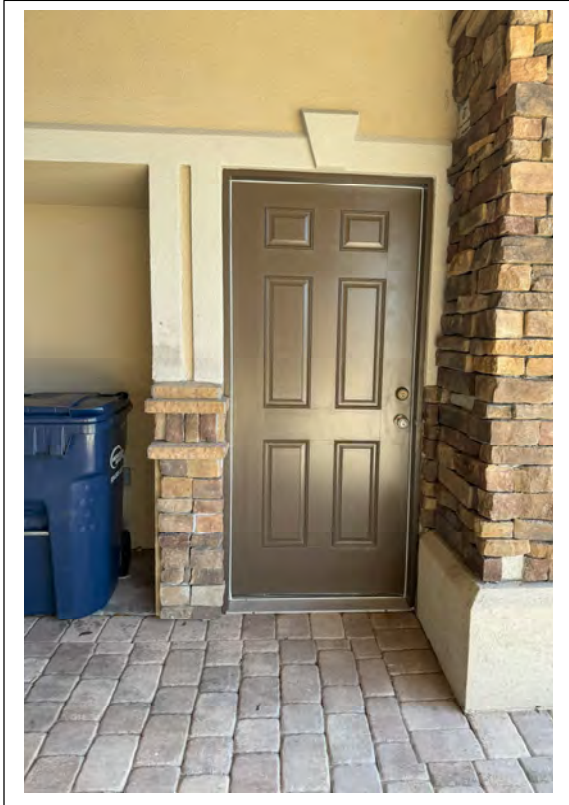
- Streetlamp bulbs around the pool deck have been replaced with high quality LED bulbs.
- GFI outlet has been replaced in pool pack.



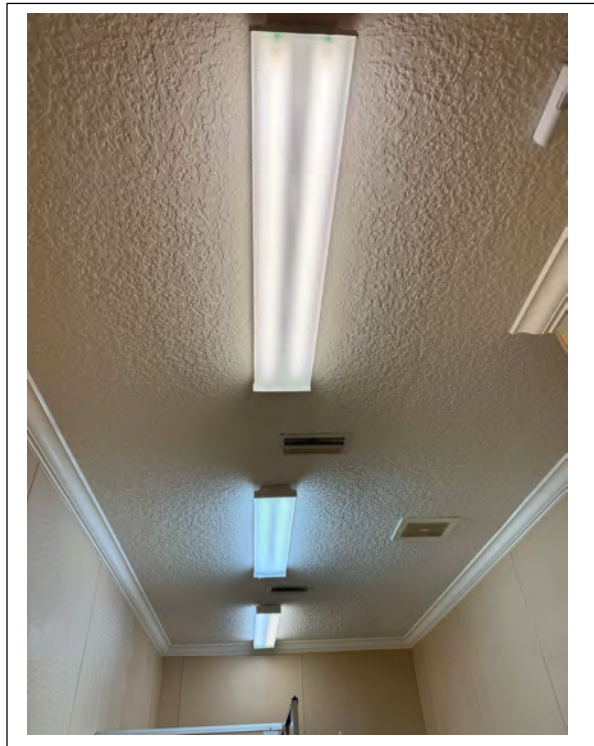
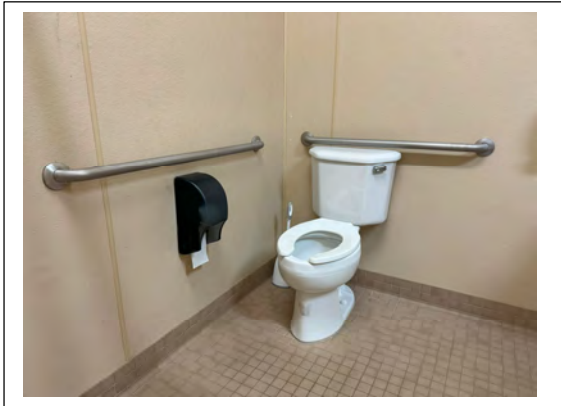
Completed Projects – Amenity Center

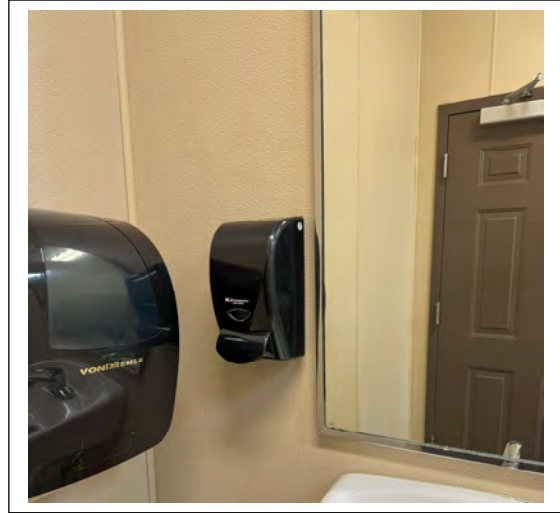
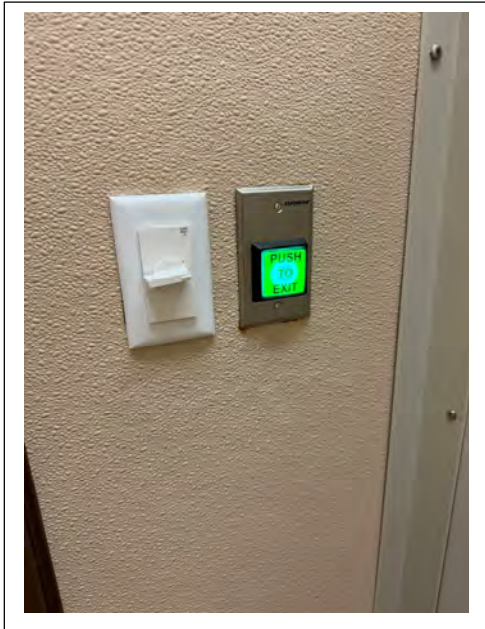


- Amenity center entrance door, kitchen door, and family restroom doors have all been refinished and painted.

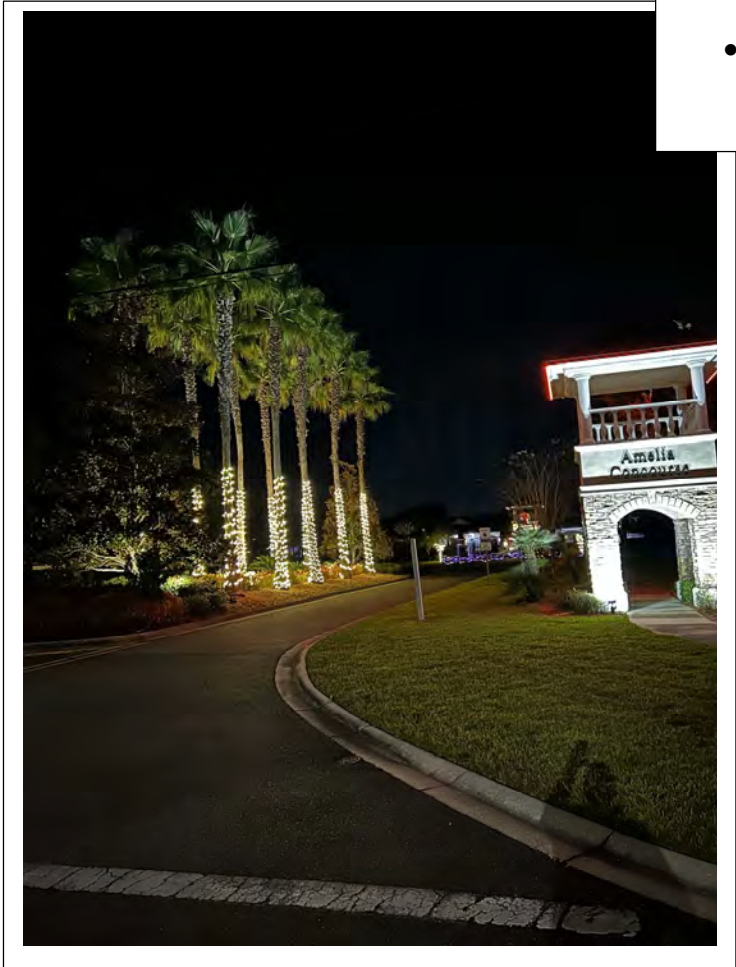


- ADA Handrails and water fountains have been polished.
- Men's restroom lighting has been fixed.
- Broken "push to exit" buttons have been replaced.
- New soap dispenser installed.





- Spinning mag lock has been repaired.
- Power restored to front island, some repairs and improvements made.
- Holiday decorations installed as a community effort.



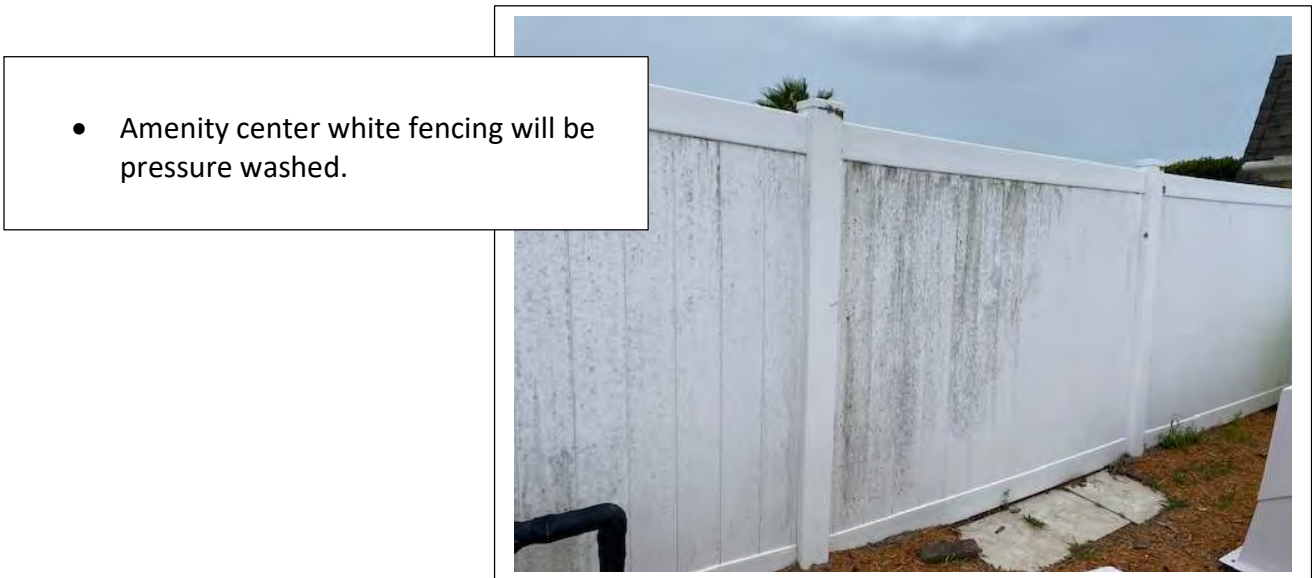
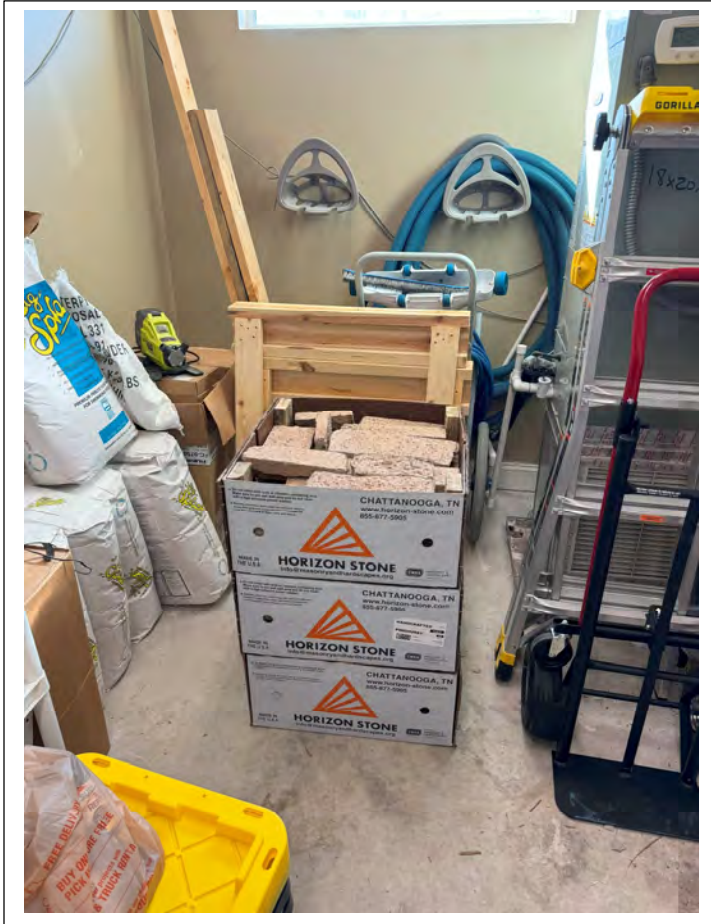
In Progress Projects- Amenity Center



- Missing stones along exterior of amenity center will be resecured.
- Stones have been sourced, matched, purchased, and delivered.

- Received quote from Brightview for paver parking area. Will pursue further quotes.
- Receiving quotes for tree trimming and clearing road frontage, phase 3.





In Progress Projects - Pool Deck

- Some pool equipment still requires repairs and need cleaning.



- Fencing needs to be cleaned and repainted.
- Paint has been purchased.

Action Items Report			
Amelia Concourse CDD			
Action Items Reported on:	Updated 1/5/2024	By: Chip Dellinger	
Action Items	Date Completed	Initials	Comments
Amenity Center - Men's Restroom	11/14/2023	CD	ADA Handrail is corroded - needs to be cleaned. Polished handrail.
Amenity Center - Pool Area	11/14/2023	CD	Water fountains are corroded - Water fountains polished
Community Entrance	11/25/2023	CD	Helped install Christmas lights- all palm trees done by GMS
Community Entrance	11/28/2023	CD	Front island at entrance having electrical issues to GFI outlets and flood lights/photo sensors. Helped to diagnose and fix
Amenity Center- Meeting room	12/7/2023	CD	Meeting room door needs to be repainted. Cleaned, sanded, taped off windows, painted door and trim 2x coats
Amenity Center - Women's Restroom	12/12/2023	Contract	Exit Button needs to be replaced - top missing. Installed by contractor.
Amenity Center - Men's Restroom	12/12/2023	Contract	Exit Button needs to be replaced - top missing. Installed by contractor.
Amenity Center - Pool Area	12/12/2023	Contract	Light bulbs in street lamps around pool deck are weak and need replacement- High quality LED bulbs replaced by contractor.
Amenity Center - Men's Restroom	12/12/2023	Contract	Hood lamp in mens restroom not working, tried to replace bulbs Repaired by contractor.
Amenity Center - Pool Area	12/12/2023	Contract	GFI outlet in pool pac not working. Used to power sump pump- Replaced by contractor.
Amenity Center- Meeting room	12/12/2023	CD	Meeting room kitchen door needs to be repainted. Cleaned, sanded, painted door and trim 2x coats premium paint.
Amenity Center- Meeting room	12/21/2023	CD	Family restroom door needs to be repainted. Cleaned, sanded, painted door and trim 2x coats premium paint.
Amenity Center - pool equipment area		In Progress	ComPac containers for pools need cleaning. Cleaning will be provided by GMS
Amenity Center - pool equipment area		In Progress	ComPac containers need repair - some need to be replaced. Repairs will be provided by GMS.
Amenity Center - along walkway to entrance to clubhouse.		Bidding	Sod or landscape material needed to fill the void.
Amenity Center - pool equipment area			White Vinyl Fence needs cleaning. Cleaning to be provided by GMS
Amenity Center Aluminum Fence			Mag lock on main gate is rotating. Carriage bolt into aluminum failure.
Amenity Center Aluminum Fence			Fence needs to be cleaned, areas need to be painted. Cleaning will be provided by GMS
Amenity Center Columns at Clubhouse			Stones/Pavers are missing and need to be replaced. Replacement will be handled by GMS
Amenity Center - Water Feature			Bottom steps appear to have mold, Rust on rails by steps need to be removed and area painted.
Amenity Center - Tower			Need cleaning and trim may need to be painted.
Amenity Center - Parking Lot			Stop Sign at exit of parking area is leaning and also slightly twisted. Sign to be reset and leveled by GMS

Conclusion

For any questions or comments regarding the above information please contact:

Chip Dellinger, Field Operations Manager, at acmanager@gmsnf.com

Respectfully,
Chip Dellinger



9/20/2022

Amelia Walk

Community Development District

Amenity Management & Field Operations Report



Kelly Mullins

AMENITY MANAGER
GOVERNMENTAL MANAGEMENT SERVICES

Cheryl Graham

FIELD OPERATIONS MANAGER
GOVERNMENTAL MANAGEMENT SERVICES

Amelia Walk
Community Development District

Amenity Management & Field Operations Report
September 20, 2022

To: Board of Supervisors

From: Kelly Mullins
Amenity Manager

Cheryl Graham
Field Operations Manager

RE: Amelia Walk Amenity Management & Field Operations Report

The following is a summary of items related to the amenity management, field operations & maintenance of Amelia Walk CDD.

Special Events

- GMS looks forward to working with the Amelia Walk Board of Supervisors and residents of the community on hosting events desired in this district
- Resident Suggestions:
 - Evening fitness classes
 - Luau event-planning for Summer 2023
- September Events:
 - September 11th – Back to School/End of Summer Party 11am
 - Food Trucks – Every Tuesday Night 5-8pm
 - Zumba- MW 9am
 - Yoga- M 9am
 - Water Aerobics MWF 8am
- Example Events:
 - Easter Bunny and Egg Hunt
 - Painting Parties
 - Bingo/Trivia/Bunco/Dominoes
 - Fitness Classes
 - Garage Sales
 - Charitable Fundraisers

Communication

- GMS was informed Amelia Walk CDD was in need of improved communication
 - Email blast updates are being sent out regularly to the community – please let your neighbors know if they do not receive our blasts to send an email to ameliawalkmanager@gmsnf.com to be added to the distribution list or stop by the office
 - Food trucks are being announced weekly
 - A monthly events/club's calendar is being published each month
 - A monthly newsletter is being published each month



September 2022 Newsletter



Fall is upon us but there is still plenty of beautiful Florida weather to enjoy! Make sure to get out and enjoy the pool and everything Amelia Walk has to offer!

Please remember to look over, read and ensure you have no questions regarding the policies below in place for the Amenity Center to include the Pool, Fitness Center, Clubhouse, Tennis Courts, Playground and Field.

If you have any comments, questions or requests, please feel free to stop by the office.

*Your Amenity Manager,
Kelly Mullins*

[Amenity Center Policies](#)

Here are the latest events happening at the

Amelia Walk Amenity Center

These dates are subject to change based on new rentals

Amenity Center September Calendar



Don't miss out on the yummy food trucks coming to Amelia Walk every Tuesday from 5pm - 8pm!

Upcoming Food Trucks:

September 6th: Twisting Roots

September 13th: Snack Boyz

September 20th: Bronx Street

September 27th: Toss N Sauce

Learn to Brew at Amelia Walk



**Saturday, September
24, 2022
11a.m. - 3 p.m.**

Amelia Walk Residents

Nassau Home Brewers Club would like to teach you how to brew high quality beer at your own home! Come watch and learn as they brew a classic style beer at the Amelia Island Clubhouse. They will provide all the equipment and ingredients, along with a finished sample of what they're brewing. The whole process will take about 4 hours, which will include plenty of time to swim, relax and meet new people. Shaun Stewart, head brewer of SJ Brewing, will also be in attendance. Snacks will be provided, and don't forget your bathing suit!

*This event is limited to members of the Nassau Home Brewers Club and residents of Amelia Walk and their guests.



Saturday, October 8, 2022
9:00 a.m. - 3:00 p.m.

Gather those unwanted items, place them on your front lawn or driveway and get ready to earn some extra cash!
You do not need to pre-register for the event.

Please be sure to follow the community guidelines listed below during the garage sale:

Garage sale must take place on Saturday, October 8th only.

Garage sale will run from 9:00 am to 3:00 pm only.

You may use your own yard/garage sale signs. However, they must be disposed of immediately following the event.

Please comply with current trash regulations.

If you have any questions, feel free to contact Kelly Mullins
at the Amenity Center office at
(904)225-3147.



Veterans and Active-Duty Support Network



Amelia Walk Active-Duty Military and Veterans

Please consider participating with the Amelia Walk Active Duty and Veterans Club.

The date and time are as follows:

Second Thursday of each month from 6:30pm - 8:30pm

Location: Amelia Walk Clubhouse

There are two major events on the horizon:

Veterans Day

Army Navy Football Game

It's a great time to get involved!



HOW TO START A NEW CLUB

Do you have a great idea for a new Community Club? Is so, please reach out to the Amenity Center Manger. Amelia Walk is always looking for new ideas to bring the Community Together!

Local Events



Be sure to check out everything happening on Amelia Island this month!

Amelia Island Events Calendar
<https://www.ameliaisland.com/Calendar>



CDD Information

The next Amelia Walk CDD meeting will be held Tuesday, September 20th, at 2:00p.m. at the Amelia Walk Amenity Center.

If you have any questions about CDD ponds or landscaping, please feel free to contact our Field Operations Manager, Cheryl Graham.
cgraham@rmsnf.com

Looking for information about your CDD? Please check out our CDD website for lots of helpful information.
www.ameliawalkcdd.com

Questions about the difference between the HOA and the CDD? Check out this helpful chart for what each entity is responsible for.

CDD

Public Entity

Created under Chapter 190 of the FL Statutes
Governed by a Board of Supervisors

Responsibilities include the creation, financing & maintenance of the community infrastructure:
*Common grounds and landscaping
* Ponds and Lakes
*Clubhouse and recreation facilities
*Gates
*Entry features and walls

How are fees paid?

Owners are assessed through their annual property tax bill in the form of a non-ad valorem assessment

HOA

Private Entity

Not-For-Profit Corporation created under Chapters 617 & 720 of the FL Statutes
Governed by a Board of Directors

Responsibilities include the implementation of the Association's governing documents; specifically, individual lot related issues.
* Deed restriction enforcement
* Architectural control
Environmental control

How are fees paid?

Owners receive an annual, quarterly or monthly statement from the Association



Amenity Center Office Hours Monday - Friday 9am - 5pm

The office will be closed on Monday, September 5, 2022,
in observance of Labor Day.

Kelly Mullins, Amenity Manager
Amelia Walk CDD
(904) 225-3147

Amelia Walk CDD | 85287 Majestic Walk Boulevard , Fernandina Beach, FL 32034

[Unsubscribe ameliawalkmanager@gmsnf.com](mailto:ameliawalkmanager@gmsnf.com)

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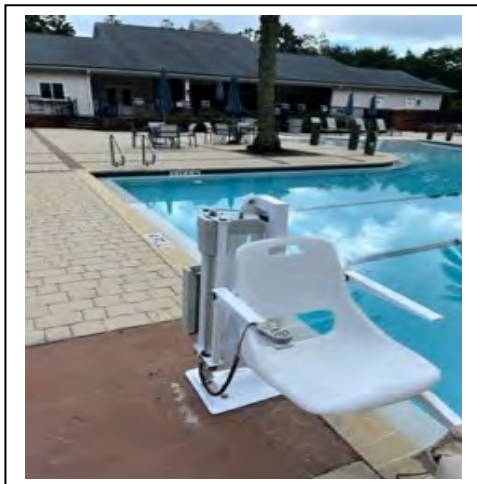
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Completed Projects – Gym



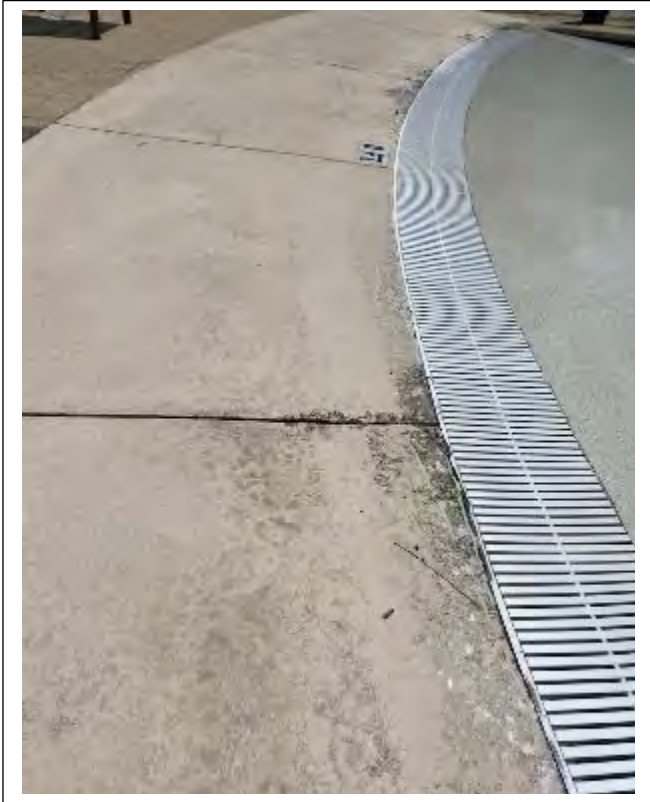
- All gym equipment has been repaired, including a recently repaired cable, and will continue to be checked to make sure equipment is in working order.
- Gym wipes have been restocked and will continue to be monitored and replaced as needed.
- The gym is continuing to be professionally cleaned weekly.

Completed Projects – Pool Deck



- The pool was closed for two days in August so GMS could treat some of the black algae spots.
- Strong chemicals were used to treat the black algae and the pool was thoroughly cleaned.
- The battery for the ADA compliant lift chair is operational and the chair has been cleaned.
- Three new life rings have been placed in the pool area.

In Progress Projects – Pool Deck



- The entrance to the pool will be scrubbed and painted at the same time the pool is drained for treatment of the black algae, which will be sometime after the busy season.

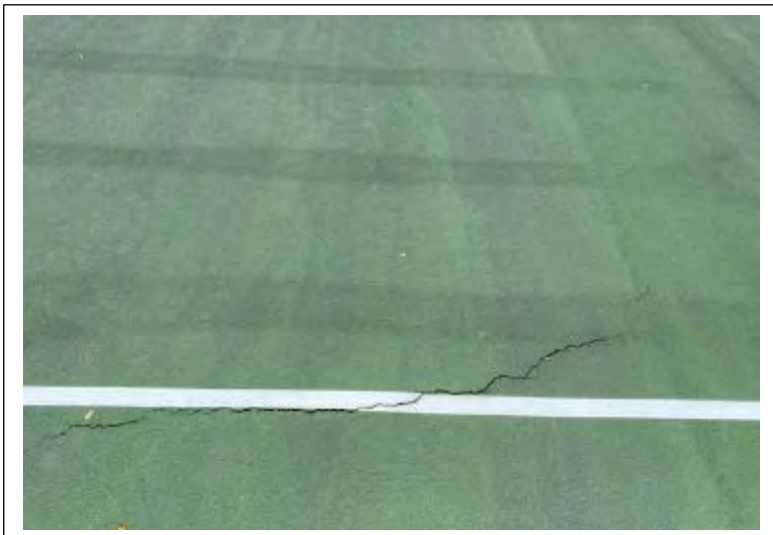
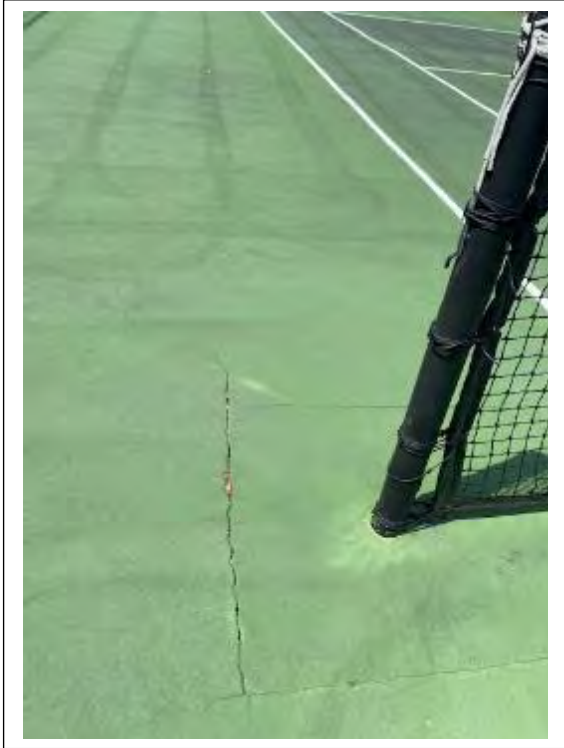
In Progress Projects – Pool Deck



- Additional projects in progress on the pool deck:
 - Replace broken pool chemical containers – both containers have broken doors that will not close properly.

Note: New containers have been delivered and will be assembled and installed.

Upcoming Projects – Tennis Court



- Multiple cracks in the surface of the tennis courts.
- Quotes to repair have been requested.
- Upon completion of surface repairs, benches will be obtained.
- Upon completion of surface repairs, quotes for shade options will be obtained.

Upcoming Projects – Soccer Field

- Upon Board approval pricing for a second goal will be obtained.



Upcoming Projects – Lakes

Pond 5 – Majestic Walk Circle



Landscape Maintenance

- Trim All has been contacted regarding multiple areas to improve throughout the community
 - Landscape beds
 - Weeds
 - Replace dead trees
 - Straighten leaning trees
 - Broken irrigation
 - Maintenance of Easements

Pond Maintenance

- Sitex Aquatics has been contacted regarding:
 - Algae in ponds
 - Fountains not working.

Note: New fountains have been ordered for:
Pond 5 at Majestic Walk Circle
and
Pond 3 which is at the end of the parking lot by the Amenity Center and is visible from Majestic Walk Blvd.

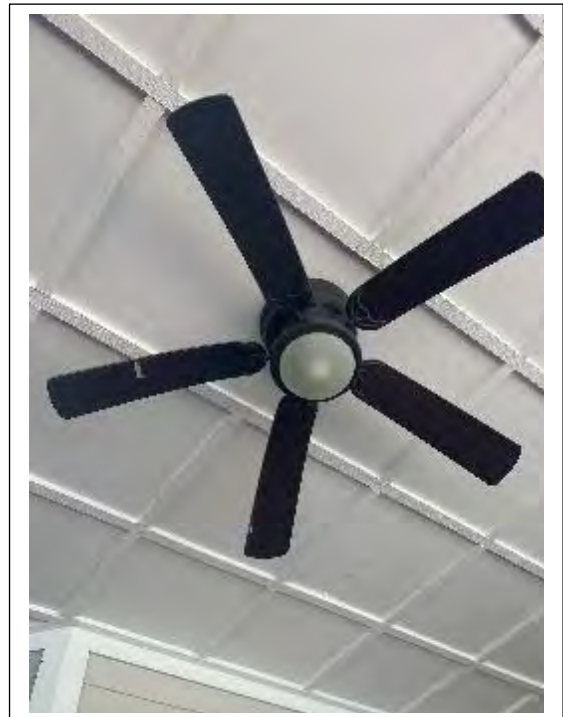


Upcoming Projects



- Replace broken and faded umbrellas around the pool
- Clean and paint all areas on playground equipment to prevent corrosion.
- Replace fans on patio facing the pool.
- Clean and paint picnic tables under the pavilion by the tennis courts

GMS works at direction of the Board of Supervisors and will only conduct larger projects upon approval



Action Items Report

Amelia Walk CDD

Action Items Reported on by:	9/12/2022		Cheryl Graham
			Kelly Mullins
Action Items	Date Completed	Initials	Comments
Pond 5 - Majestic Walk - East side of entrance			New fountain has been ordered and is expected to be installed during the week of September 26th.
Fall River - JEA Lift Station - West side		CG	Sod was removed for cluster mailboxes however it was the incorrect location. Contractor will be financially responsible for the replacement of the sod.
Landscaping - corner of Majestic Walk Pkwy. and Circle		CG	New quote has been provided that will match all corners of Majestic Walk Circle.
Pool Equipment containers		KM/CG	Existing containers are in poor condition. New containers have been purchased and need assembly.
Faucet Posts		KM/CG	Need painting.
Ceiling Fans - Poolside Patio			Fan blades warped and motor is corroded. New fans have been purchased and will be installed ASAP.
Tennis Courts			Cracks in surface in play area and by net post. Quotes have been requested.
Replace Broken and Faded Pool Umbrellas			Style and cost to be provided after more pressing pool matters are handled. Consider replacement for spring 2023
Pond 3 - Fountain not working			New fountain has been ordered and is expected to be installed during the week of September 26th.
Community Signs at Entrance			Surface is faded, letters are peeling. Both signs need to be repainted.
Picnic Tables on Pavilion			Metal is corroded. Table legs will be cleaned, sanded, patched and painted.
Playground			All joints have been reviewed. Any corroded bolts will be replaced, areas cleaned and painted.

Conclusion

For any questions or comments regarding the above information please contact Cheryl Graham, Field Operations Manager, at cgraham@rmsnf.com and Kelly Mullins, Amenity Manager, at ameliawalkmanager@gmsnf.com.

Respectfully,

Kelly Mullins
Cheryl Graham





Governmental Management Services

EXHIBIT "B" – RFP Questions

REQUEST:

Describe training provided to employees (HR, job specific, certifications, etc.).

ANSWER:

GMS offers robust professional development and formalized training programs for all key positions in the organization. The training is formal with training agendas, and training guides, and all training is recorded in a secure GMS-Only website for ongoing reference.

In addition, we routinely invite external speakers to meet with our teams (District Counsel, Insurance Training, Risk Management, Assessment Administration, Public Record Requests, Dealing With Conflict, Proactive Customer Service, Coaching for Excellence, etc.)

Most of our field operations and maintenance teams have achieved CPO certifications. Most of our Amenity Managers and Lifeguards have taken CPR and First Aid training.

All leaders participate in annual compliance and HR Training Programs.

Proposer embraces safety practices in the workplace. We also provide periodic OSHA safety training to our staff including Ladder training, height protection training, lifting training, lift (operations) training, etcetera as needed. Our new employees are assigned a mentor, and all staff are under the direction of our Property Management Team who provide additional training and/or certifications. We also support online and/or in-person training with expense reimbursement opportunities as part of our professional development programs both with GMS and RMS.



Governmental Management Services

EXHIBIT "B" – RFP Questions

REQUEST:

Describe your approach to quality assurance with respect to the services you are proposing: What processes/tools do you use to ensure the quality of services you provide?

ANSWER:

To ensure quality services, all clients are discussed, at a minimum, weekly in staff meetings. In addition, we encourage proactive quality practices, and any staff member may escalate issues to all levels of the organization requesting assistance. All monthly reports are reviewed by each organizational supervisor(s) before being included in the monthly agenda packages. We also have our Operations Managers and Amenity Managers provide verbal updates at the Board of Supervisor scheduled meetings. We utilize a sophisticated TimeCo geocoding time tracking system for all amenity employees which tracks the geocoding location when time sheets are submitted supporting service accuracy.

Our client satisfaction and retention rates are outstanding; this further supports the voice of customer sentiments about the quality and consistency of our services.



Governmental Management Services

EXHIBIT "B" – RFP Questions

REQUEST:

Describe what support onsite personnel get from corporate. (Operational Management, Payroll Support, HR, IT, Accounts Payable, etc.)

ANSWER:

GMS has a large corporate services function that provides a host of services to the organization. This structure allows for "Centers of Excellence" in functions such as:

- Payroll,
- Recruiting,
- Accounts Payable,
- Financial Reporting,
- Information Technology,
- Corporate Training,
- Compliance Services,
- and all Human Resources as examples.

Of note, our Amenity and Field Managers are responsible for approving invoices; all other Accounts Payable and Financial Reporting Functions are centralized in our Corporate and Regional Accounting Centers.