THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

March 30, 2026

BOARD OF SUPERVISORS

PUBLIC HEARINGS, REGULAR MEETING & AUDIT COMMITTEE AGENDA

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

AGENDA LETTER

The Groves of St. Lucie County Community Development District

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

March 23, 2026

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

Board of Supervisors
The Groves of St. Lucie County Community Development District

Dear Board Members:

The Board of Supervisors of The Groves of St. Lucie County Community Development District will hold Public Hearings, a Regular Meeting and an Audit Committee Meeting on March 30, 2026 at 11:00 a.m., at the Fairfield Inn & Suites Ft. Pierce, 6502 Metal Dr., Ft. Pierce, Florida 34945. The agenda is as follows:

1. Call to Order/Roll Call

2. Public Comments

3. Public Hearing Confirming the Intent of the District to Use the Uniform Method of Levy, Collection and Enforcement of Non-Ad Valorem Assessments as Authorized and Permitted by Section 197.3632, Florida Statutes; Expressing the Need for the Levy of Non-Ad Valorem Assessments and Setting Forth the Legal Description of the Real Property Within the District's Jurisdictional Boundaries that May or Shall Be Subject to the Levy of District Non-Ad Valorem Assessments; Providing for Severability; Providing for Conflict and Providing for an Effective Date
   A. Affidavit/Proof of Publication
   B. Consideration of Resolution 2026-12, Expressing its Intent to Utilize the Uniform Method of Levying, Collecting, and Enforcing Non-Ad Valorem Assessments Which May Be Levied by The Groves of St. Lucie County Community Development District in Accordance with Section 197.3632, Florida Statutes; Providing a Severability Clause; and Providing an Effective Date

4. Public Hearing to Consider the Adoption of an Assessment Roll and the Imposition of Special Assessments Relating to the Financing and Securing of Certain Public Improvements
   - *Hear testimony from the affected property owners as to the propriety and advisability of making the improvements and funding them with special assessments on the property.*
   - *Thereafter, the governing authority shall meet as an equalizing board to hear any and all complaints as to the special assessments on a basis of justice and right.*

A. Affidavit/Proof of Publication

B. Mailed Notice to Property Owner(s)

C. Master Engineer's Report *(for informational purposes)*

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

E. Consideration of Resolution 2026-13, Making Certain Findings; Authorizing a Capital Improvement Plan; Adopting an Engineer's Report; Providing an Estimated Cost of Improvements; Adopting an Assessment Report; Equalizing, Approving, Confirming and Levying Debt Assessments; Addressing the Finalization of Special Assessments; Addressing the Payment of Debt Assessments and the Method of Collection; Providing for the Allocation of Debt Assessments and True-Up Payments; Addressing Government Property, and Transfers of Property to Units of Local, State and Federal Government; Authorizing an Assessment Notice; and Providing for Severability, Conflicts and an Effective Date

5. Public Hearing to Hear Public Comments and Objections to the Adoption of the Rules of Procedure, Pursuant to Sections 120.54 and 190.035, Florida Statutes

   A. Affidavits of Publication

   B. Consideration of Resolution 2026-14, Adopting Rules of Procedure; Providing a Severability Clause; and Providing an Effective Date

6. Consideration of U.S. Bank Global Corporate Trust Services Engagement Letter

7. Discussion: Fiscal Year 2026/2027 Budget

8. Consideration of Resolution 2026-09, Designating Dates, Times and Locations for Regular Meetings of the Board of Supervisors of the District for the Remainder of Fiscal Year 2025/2026 and Providing for an Effective Date

9. Consideration of Resolution 2026-15, Designating Dates, Times and Locations for Regular Meetings of the Board of Supervisors of the District for Fiscal Year 2026/2027 and Providing for an Effective Date

10. Recess Regular Meeting/Commencement of Audit Selection Committee Meeting

11. Review of Responses to Request for Proposals (RFP) for Annual Audit Services

    A. Affidavit of Publication

    B. RFP Package

C. Respondent(s)
   I. Berger, Toombs, Elam, Gaines & Frank
   II. Carr, Riggs & Ingram
   III. Grau & Associates
D. Auditor Evaluation Matrix/Ranking

12. Termination of Audit Selection Committee Meeting/Reconvene Regular Meeting

13. Consider Recommendation of Audit Selection Committee
   - Award of Contract

14. Consideration of Response(s) to Request for Qualifications (RFQ) for Engineering Services
   A. Affidavit of Publication
   B. RFQ Package
   C. Respondent(s)
      I. Kimley-Horn and Associates, Inc.
      II. South Florida Engineering and Consulting LLC
   D. Competitive Selection Criteria/Ranking
   E. Award of Contract

15. Consideration of Resolution 2026-10, Designating the Location of the Local District Records Office and Providing an Effective Date

16. Ratification of Kimley-Horn and Associates, Inc. Interim Engineering Services Agreement

17. Acceptance of Unaudited Financial Statements as of February 28, 2026

18. Approval of January 22, 2026 Special Meeting Minutes

19. Staff Reports
   A. District Counsel: *Kutak Rock LLP*
   B. District Engineer (Interim): *Kimley-Horn and Associates, Inc.*
   C. District Manager: *Wrathell, Hunt and Associates, LLC*
      - Property Insurance on Vertical Assets
      - Form 1 Submission and Ethics Training

- NEXT MEETING DATE: TBD
  - QUORUM CHECK

SEAT 1	TIM GEE	☐ IN PERSON	☐ PHONE	☐ NO
SEAT 2	JULIET MISCONI	☐ IN PERSON	☐ PHONE	☐ NO
SEAT 3	MICHAEL DULA	☐ IN PERSON	☐ PHONE	☐ NO
SEAT 4	MICHAEL FOLSTEIN	☐ IN PERSON	☐ PHONE	☐ NO
SEAT 5	DEREK YOUNGBLOOD	☐ IN PERSON	☐ PHONE	☐ NO

- Performance Measures/Standards & Annual Reporting Form *(for informational purposes)*

20. Public Comments

21. Board Members' Comments/Requests

22. Adjournment

If you should have any questions or concerns, please do not hesitate to contact me directly at (561) 346-5294 or Chris Conti at (724) 971-8827.

Sincerely,

Cindy Cerbone

Cindy Cerbone
District Manager

FOR BOARD MEMBERS AND STAFF TO ATTEND BY TELEPHONE
CALL-IN NUMBER: 1-888-354-0094
PARTICIPANT PASSCODE: 354 2519

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

3

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

3A

USA TODAY CO.

LocaliQ

PO Box 631244 Cincinnati, OH 45263-1244

AFFIDAVIT OF PUBLICATION

Daphne Gillyard
The Groves of St Lucie County CDD
2300 Glades RD
Suite 410W
Boca Raton FL 33431-7386

STATE OF WISCONSIN, COUNTY OF BROWN

Before the undersigned authority personally appeared, who on oath says that he or she is the Legal Advertising Representative of the Indian River Press Journal/St Lucie News Tribune/Stuart News, newspapers published in Indian River/St Lucie/Martin Counties, Florida; that the attached copy of advertisement, being a Legal Ad in the matter of Public Notices, was published on the publicly accessible websites of Indian River/St Lucie/Martin Counties, Florida, or in a newspaper by print in the issues of, on:

SCN StLucie-IndianRv-Stuart	03/02/2026, 03/09/2026, 03/16/2026, 03/23/2026
SCN tcpalm.com	03/02/2026, 03/09/2026, 03/16/2026, 03/23/2026

Affiant further says that the website or newspaper complies with all legal requirements for publication in chapter 50, Florida Statutes.
Subscribed and sworn to before me, by the legal clerk, who is personally known to me, on 03/23/2026

Legal Clerk

Notary, State of WI, County of Brown

9-7-26

My commission expires

Publication Cost:	$707.60	
Tax Amount:	$0.00	
Payment Cost:	$707.60	
Order No:	12098161	# of Copies:
Customer No:	1499243	1
PO #:		

THIS IS NOT AN INVOICE!

Please do not use this form for payment remittance.

KONGMENG YANG
Notary Public
State of Wisconsin

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

Notice is hereby given that the Board of Supervisors ("Board") of The Groves of St. Lucie County Community Development District ("District") intends to use the uniform method of collecting non-ad valorem special assessments to be levied by the District pursuant to Section 197.3632, Florida Statutes. The Board of Supervisors of the District will conduct a public hearing on March 30, 2026 at 11:00 a.m., at the Fairfield Inn & Suites Ft. Pierce, 6502 Metal Dr., Ft. Pierce, Florida 34945.

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

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

Owners of the properties to be assessed and other interested parties may appear at the public hearing and be heard regarding the use of the Uniform Method. This hearing is open to the public and will be conducted in accordance with the provisions of Florida law. The public hearing may be continued to a date, time, and location to be specified on the record at the hearing. There may be occasions when Supervisors or District Staff may participate by speaker telephone.

Pursuant to provisions of the Americans with Disabilities Act, any person requiring special accommodations to participate in the hearing and/or meeting is asked to contact the District Manager's office at c/o Wrathell, Hunt & Associates, LLC, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431, 561-571-0010, at least forty-eight (48) hours before the hearing and/or meeting. If you are hearing or speech impaired, please contact the Florida Relay Service at 1-800-955-8771 who can aid you in contacting the District Manager's Office.

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

District Manager
Pub: March 2, 9, 16, 23, 2026 TCN12098161

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

3B

RESOLUTION 2026-12

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

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

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

WHEREAS, pursuant to Section 197.3632, Florida Statutes, the District has caused notice of a public hearing to be advertised weekly in a newspaper of general circulation within St. Lucie County, Florida, for four (4) consecutive weeks prior to such hearing.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT:

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

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

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

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

PASSED AND ADOPTED this 30th day of March, 2026.

ATTEST**:**

THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT

_____
Secretary/Assistant Secretary

_____
Chair/Vice Chair, Board of Supervisors

Exhibit A: Legal Description

Exhibit A:
Legal Description

PHASE 1

LEGAL DESCRIPTION

BEING A PORTION OF THE PLAT OF FORT PIERCE FARMS, ACCORDING TO THE PLAT THEREOF RECORDED IN PLAT BOOK 2, PAGE 7, PUBLIC RECORDS OF ST. LUCIE COUNTY, FLORIDA, SAID PORTION BEING IN THE EAST HALF (E.1/2) OF THE NORTHWEST QUARTER (NW 1/4) OF SECTION 16, TOWNSHIP 34 SOUTH, RANGE 39 EAST, BEING THAT PART LYING NORTH OF INDRIO ROAD, AND LYING EAST OF KOBLEGARD ROAD AS RECORDED IN DEED BOOK 78, PAGE 288 AND IN OFFICIAL RECORDS BOOK 3762, PAGE 2597 OF SAID PUBLIC RECORDS, SAID PORTION BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

COMMENCING AT THE WEST QUARTER CORNER OF SAID SECTION 16; THENCE NORTH 0°32'06" EAST (STATE PLANE GRID BEARING DATUM) ALONG THE WEST LINE OF SECTION 16, A DISTANCE OF 2618.10 FEET TO A POINT ON A LINE THAT IS 45 FEET SOUTH OF AND PARALLEL WITH THE NORTH LINE OF SECTION 16; THENCE SOUTH 89°48'23" EAST ALONG A LINE THAT IS 45 FEET SOUTH OF AND PARALLEL WITH THE NORTH LINE OF SECTION 16, A DISTANCE OF 1321.24 FEET TO EAST RIGHT-OF-WAY LINE OF SAID KOBLEGARD ROAD, BEING THE **POINT OF BEGINNING** OF THE PARCEL DESCRIBED HEREIN; THENCE CONTINUE SOUTH 89°48'23" EAST ALONG A LINE THAT IS 45 FEET SOUTH OF AND PARALLEL WITH THE NORTH LINE OF SECTION 16, A DISTANCE OF 1241.23 FEET TO THE WEST RIGHT-OF-WAY LINE OF F.P.F.W.C.D CANAL NO. 1, BEING A LINE THAT IS 80.00 FEET WEST OF AND PARALLEL WITH THE EAST LINE OF THE NORTHWEST QUARTER OF SECTION 16; THENCE SOUTH 00°48'42" WEST ALONG SAID RIGHT-OF-WAY LINE, 1779.86 FEET; THENCE NORTH 89°22'00" WEST, 316.74 FEET; THENCE SOUTH 00°12'06" WEST, 290.93 FEET; THENCE NORTH 89°47'49" WEST, 138.59 FEET; THENCE NORTH 00°12'45" WEST, 264.17 FEET; THENCE SOUTH 89°54'39" WEST, 114.49 FEET; THENCE NORTH 00°15'10" EAST, 151.65 FEET; THENCE NORTH 89°56'14" WEST, 56.93 FEET; THENCE NORTH 00°04'18" EAST, 297.38 FEET; THENCE NORTH 89°43'13" WEST, 604.25 FEET TO THE EAST RIGHT-OF-WAY LINE OF SAID KOBLEGARD ROAD; THENCE NORTH 00°40'23" EAST ALONG THE EAST RIGHT-OF-WAY LINE OF KOBLEGARD ROAD, 213.09 FEET TO A POINT OF CURVATURE; THENCE NORTHERLY ALONG THE EAST RIGHT-OF-WAY LINE OF KOBLEGARD ROAD BEING AN ARC OF A CURVE CONCAVE TO THE EAST HAVING A RADIUS OF 4950.00 FEET, A CENTRAL ANGLE OF 04°47'43", AN ARC LENGTH OF 414.27 FEET TO A POINT OF REVERSE CURVATURE; THENCE NORTHERLY ALONG SAID EAST RIGHT-OF-WAY LINE BEING AN ARC OF A CURVE CONCAVE TO THE WEST HAVING A RADIUS OF 5050.00 FEET, A CENTRAL ANGLE OF 05°22'09", AN ARC LENGTH OF 473.22 FEET TO A POINT OF NON-TANGENCY; THENCE NORTH 90°00'00" WEST ALONG SAID RIGHT-OF-WAY LINE, 34.75 FEET; THENCE NORTH 00°40'23" EAST ALONG SAID EAST RIGHT-OF-WAY LINE, 255.67 FEET TO THE POINT OF BEGINNING.

ABOVE DESCRIBED PARCEL CONTAINS 45.154 ACRES, MORE OR LESS.

SHEET: 1 OF 3

JOB NUMBER: D 22-005.D

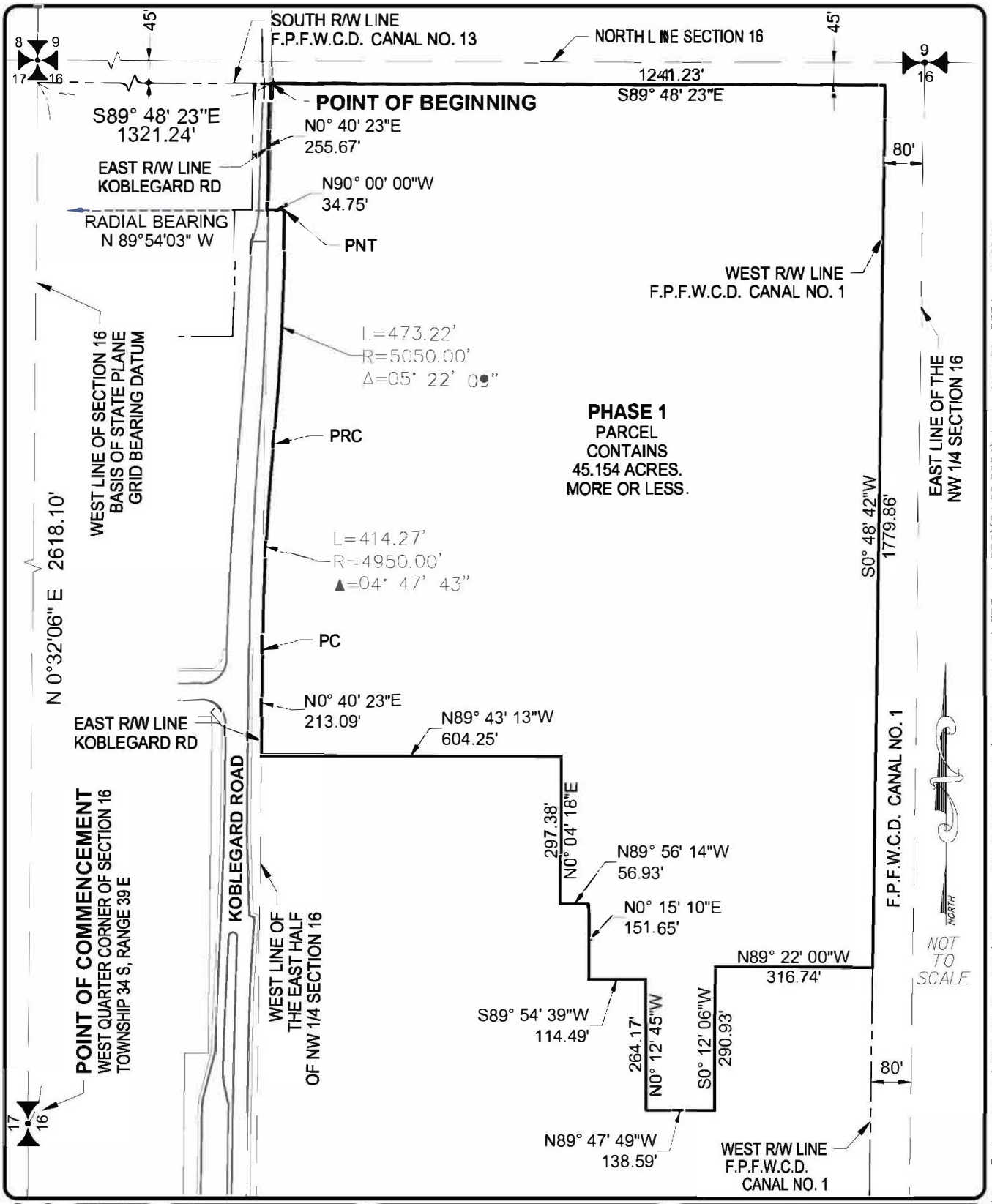
DRAWN BY: JC SCHUMONT
CHECKED BY: G.P. WILLIAMS
SCALE: N/A
DATE: 08/04/08
FIELD BOOK/PAGES: N/A

BY:	DATE:	REVISIONS

SKETCH AND LEGAL DESCRIPTION
PARCEL 1 - NE NEIGHBORHOOD
PHASE 1
BEDNER FARMS

F.R.S. & ASSOCIATES, INC.
LAND SURVEYORS AND LAND PLANNERS
CERTIFICATE OF AUTHORIZATION NO. LB 4241
2257 VISTA PARKWAY, SUITE 4
WEST PALM BEACH, FLORIDA 33411
PHONE (561) 478-7178
Web Site: www.frssurvey.com

T:\Draw\Indrio - Bedner Farms\Civil 3D Drawings\Bedner - NE Neighborhood (sketch and legal SP2 and SP3)(04.26.2024).dwg May 01, 2024 - 3:39pm



2 OF 3 SHEETS

02-2024-0

FIELD WORK	N/A	
DRAWN BY	EMS	
CHKD	N/A	
SCALE	1"=200'	
PROJECT MGR	G.PHILLIPS	
DATE	04/26/24	

BY:	DATE:	REVISIONS

SKETCH AND LEGAL DESCRIPTION
PARCEL 1 - NE NEIGHBORHOOD
PHASE 1
BEDNER FARMS

F.R.S. & ASSOCIATES, INC.
LAND SURVEYORS AND LAND PLANNERS
CERTIFICATE OF AUTHORIZATION NO. LB 4211
2257 VISTA PARKWAY, SUITE 4
WEST PALM BEACH, FLORIDA 33411
PHONE (561) 478-7178
Web Site: www.frssurvey.com

T:\Draw\Indrio - Bedner Farms\Civil 3D Drawings\Bedner - NE Neighborhood (sketch and legal SP2 and SP3)(04.26.2024).dwg May 01, 2024 - 3:39pm

LEGEND

F.P.F.W.C.D. = FORT PIERCE FARMS WATER CONTROL DISTRICT

R/W = RIGHT-OF-WAY

Δ = CENTRAL ANGLE OF CURVE

R = RADIUS OF CURVE

L = LENGTH OF ARC OF CURVE

PC = POINT OF CURVATURE

PRC = POINT OF REVERSE CURVATURE

PT = POINT OF TANGENCY OF CURVE

PNT = POINT OF NON-TANGENCY CURVE

SURVEYOR'S NOTES

1. BEARINGS SHOWN HEREON REFER TO NORTH 0°32'06" EAST (STATE PLANE GRID BEARING DATUM) ALONG THE WEST LINE OF SECTION 16, TOWNSHIP 34 SOUTH, RANGE 39 EAST, ALL OTHER BEARINGS ARE RELATIVE THERETO.
2. THIS IS NOT A BOUNDARY SURVEY.
3. THE LANDS SHOWN HEREON WERE NOT BASED UPON AN ABSTRACT OF TITLE. NO SEARCH OF THE PUBLIC RECORDS WAS MADE BY THIS FIRM FOR RIGHTS-OF-WAY, EASEMENTS, OWNERSHIP, OR OTHER INSTRUMENTS OF RECORD THAT MAY AFFECT THE SUBJECT SITE.
4. BEARINGS AND DISTANCES SHOWN HEREON ARE GRID, NORTH AMERICAN DATUM OF 1983 / 2011 ADJUSTMENT (NAD 83/11), FLORIDA EAST ZONE, LINEAR UNITS ARE U.S. SURVEY FEET.
5. THE LEGAL DESCRIPTION AND SKETCH ATTACHED HEREWITH ARE INTENDED TO BE INCLUDED TOGETHER, ALONG WITH THIS CERTIFICATION.

LAND SURVEYOR'S STATEMENT

I HEREBY CERTIFY THAT THE SKETCH ATTACH HEREWITH IS A TRUE AND CORRECT REPRESENTATION OF THE ACCOMPANYING DESCRIPTION AND COMPLIES WITH THE STANDARDS OF PRACTICE SET FORTH IN CHAPTER 5J-17, F.A.C. BY THE FLORIDA BOARD OF PROFESSIONAL SURVEYORS AND MAPPERS, PURSUANT TO SECTION 472.027, FLORIDA STATUTES.

F.R.S. AND ASSOCIATES, INC.

Gary P Williams

Digitally signed by Gary P Williams
DN: c=US, sn=Williams, givenName=Gary P, email=gpw4817@gmail.com, cn=Gary P Williams
Date: 2024.05.01 15:44:17 -04'00'

BY: _____

GARY P. WILLIAMS, P.S.M.
FLORIDA CERTIFICATION No. 4817
FOR THE FIRM
NOT VALID UNLESS SEALED WITH SURVEYOR'S EMBOSSED SEAL AND SIGNATURE OR ELECTRONICALLY SIGNED AND SEALED.

SHEET 3 OF 3

JOB NUMBER D 22-005.D

DRAWN BY: JC SCHADORT
APPROVED BY: GARY P. WILLIAMS
DATE: 04/04/08
FIELD BOOK/PAGES: N/A

BY:	DATE:	REVISIONS

SKETCH AND LEGAL DESCRIPTION
PARCEL 1 - NE NEIGHBORHOOD
PHASE 1
BEDNER FARMS

F.R.S. & ASSOCIATES, INC.
LAND SURVEYORS AND LAND PLANNERS
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T:\Draw\Indrio - Bedner Farms\Civil 3D Drawings\Bedner - NE Neighborhood (sketch and legal SP2 and SP3)(04.26.2024).dwg May 01, 2024 - 3:39pm

TOGETHER WITH:

PARCEL 2 NORTH

BEING A PORTION OF THE PLAT OF FORT PIERCE FARMS, ACCORDING TO THE PLAT THEREOF RECORDED IN PLAT BOOK 2, PAGE 7, PUBLIC RECORDS OF ST. LUCIE COUNTY, FLORIDA, SAID PORTION BEING IN THE WEST HALF (W.1/2) OF THE NORTHWEST QUARTER (NW 1/4) OF SECTION 16, AND IN THE EAST HALF (E.1/2) OF THE NORTHEAST QUARTER (NE 1/4) OF SECTION 17, TOWNSHIP 34 SOUTH, RANGE 39 EAST, BEING THAT PART LYING NORTH OF SPANISH LAKES BOULEVARD AS RECORDED IN OFFICIAL RECORDS BOOK 3762, PAGE 2597, AND LYING WEST OF KOBLEGARD ROAD AS RECORDED IN DEED BOOK 78, PAGE 288 AND IN OFFICIAL RECORDS BOOK 3762, PAGE 2597 OF SAID PUBLIC RECORDS, SAID PORTION BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

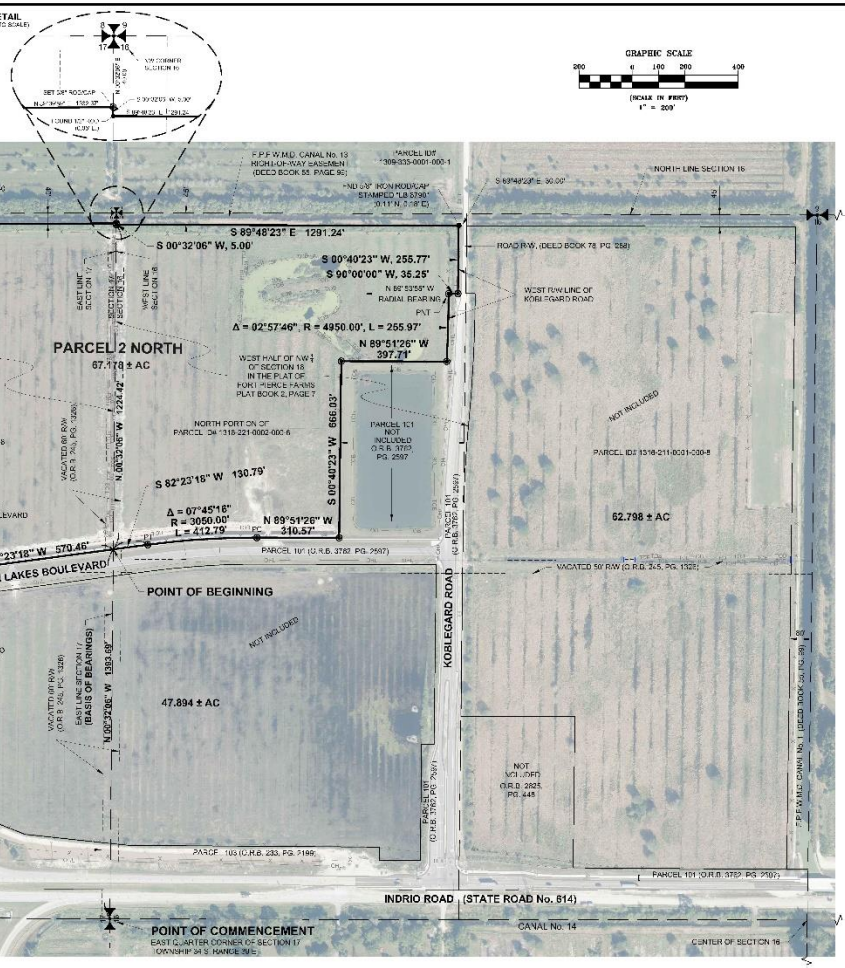
COMMENCING AT THE EAST QUARTER CORNER OF SAID SECTION 17; THENCE NORTH 0°32'06" EAST (STATE PLANE GRID BEARING DATUM) ALONG THE EAST LINE OF SECTION 17, A DISTANCE OF 1393.69 FEET TO THE NORTH RIGHT-OF-WAY LINE OF SAID SPANISH LAKES BOULEVARD, BEING THE **POINT OF BEGINNING** OF THE PARCEL DESCRIBED HEREIN; THENCE SOUTH 82°23'18" WEST ALONG THE NORTH RIGHT-OF-WAY LINE OF SAID SPANISH LAKES BOULEVARD, 570.46 FEET TO A POINT OF CURVATURE; THENCE WESTERLY ALONG AN ARC OF A CURVE CONCAVE TO THE NORTH, HAVING A RADIUS OF 1450.00 FEET, A CENTRAL ANGLE OF 30°55'35, AN ARC DISTANCE OF 782.67 FEET TO A NON-TANGENT POINT ON THE WEST LINE OF THE EAST HALF (E. 1/2) OF THE NORTHEAST QUARTER OF SECTION 17, THROUGH WHICH A RADIAL LINE BEARS NORTH 23°18'53" EAST; THENCE NORTH 0°30'19.0" EAST ALONG SAID WEST LINE, 1191.59 FEET TO A POINT ON A LINE THAT IS 40 FEET SOUTH OF AND PARALLEL WITH THE NORTH LINE OF SECTION 17; THENCE NORTH 89°39'59" EAST ALONG SAID PARALLEL LINE, 1332.37 FEET TO THE EAST LINE OF SECTION 17; THENCE SOUTH 00°32'06" WEST ALONG THE WEST LINE OF SECTION 16, A DISTANCE OF 5.00 FEET; THENCE SOUTH 89°48'23" EAST ALONG A LINE THAT IS 45 FEET SOUTH OF AND PARALLEL WITH THE NORTH LINE OF SECTION 16, A DISTANCE OF 1291.24 FEET TO WEST RIGHT-OF-WAY LINE OF SAID KOBLEGARD ROAD; THENCE SOUTH 00°40'23" WEST ALONG SAID WEST LINE, 255.77 FEET; THENCE SOUTH 90°00'00" WEST ALONG SAID RIGHT-OF-WAY LINE, 35.25 FEET TO A NON-TANGENT POINT OF CURVATURE THROUGH WHICH A LINE, RADIAL TO THE SUBSEQUENT CURVE, BEARS NORTH 89°53'55" WEST; THENCE SOUTHERLY ALONG THE WEST RIGHT-OF-WAY LINE OF KOBLEGARD ROAD BEING AN ARC OF A CURVE CONCAVE TO THE WEST HAVING A RADIUS OF 4950.00 FEET, A CENTRAL ANGLE OF 02°57'46", AN ARC LENGTH OF 255.97 FEET; THENCE NORTH 89°51'26" WEST ALONG THE NORTH LINE OF PARCEL 101 AS DESCRIBED IN SAID OFFICIAL RECORD BOOK 3762, PAGE 2597, A DISTANCE OF 397.71 FEET; THENCE SOUTH 00°40'23" WEST ALONG THE WEST LINE OF SAID PARCEL 101, A DISTANCE OF 666.03 FEET TO THE NORTH RIGHT-OF-WAY LINE OF SAID SPANISH LAKES BOULEVARD; THENCE NORTH 89°51'26" WEST ALONG SAID RIGHT-OF-WAY LINE, 310.57 FEET TO A POINT OF CURVATURE; THENCE WESTERLY ALONG AN ARC OF A CURVE CONCAVE TO THE SOUTH HAVING A RADIUS OF 3050.00 FEET, A CENTRAL ANGLE OF 07°45'16", AN ARC LENGTH OF 412.79 FEET TO A POINT OF TANGENCY; THENCE SOUTH 82°23'18" WEST ALONG THE NORTH RIGHT-OF-WAY LINE OF SAID SPANISH LAKES BOULEVARD, 130.79 FEET TO THE POINT OF BEGINNING.

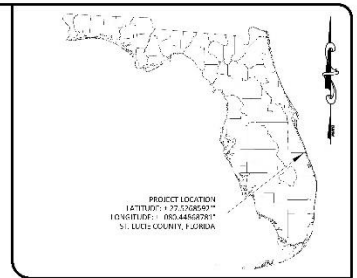
ABOVE DESCRIBED PARCEL CONTAINS 67.178 ACRES, MORE OR LESS.

AND FURTHER DESCRIBED IN THE FOLLOWING PAGES:

SHEET INDEX

1. COVER SHEET AND BOUNDARY
2. TOPOGRAPHICAL





LOCATION MAP
NOT TO SCALE

LEGAL DESCRIPTION

PARCEL 2 NORTH

BEING A PORTION OF THE PLAT OF FORT PIERCE FARMS, ACCORDING TO THE PLAT THEREOF RECORDED IN PLAT BOOK 2, PAGE 7, PUBLIC RECORDS OF ST. LUCIE COUNTY, FLORIDA, SAID PORTION BEING IN THE WEST HALF (W 1/2) OF THE NORTHWEST QUARTER (NW 1/4) OF SECTION 16, AND IN THE EAST HALF (E 1/2) OF THE NORTHEAST QUARTER (NE 1/4) OF SECTION 17, TOWNSHIP 34 SOUTH, RANGE 39 EAST, BEING THAT PART LYING NORTH OF SPANISH LAKES BOULEVARD AS RECORDED IN OFFICIAL RECORDS BOOK 3782, PAGE 2587, AND LYING WEST OF KOBLEGARD ROAD AS RECORDED IN DEED BOOK 78, PAGE 288 AND IN O.R. RECORDS BOOK 3782, PAGE 2587 OF SAID PUBLIC RECORDS, SAID PORTION BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

COMMENCING AT THE EAST QUARTER CORNER OF SAID SECTION 17; THENCE NORTH 0°32'06" EAST (STATE PLANE GRID BEARING DATUM) ALONG THE EAST LINE OF SECTION 17, A DISTANCE OF 1332.69 FEET TO THE NORTH RIGHT-OF-WAY LINE OF SAID SPANISH LAKES BOULEVARD; BEING THE **POINT OF BEGINNING** OF THE PARCEL DESCRIBED HEREIN; THENCE SOUTH 82°23'16" WEST ALONG THE NORTH RIGHT-OF-WAY LINE OF SAID SPANISH LAKES BOULEVARD, 570.46 FEET TO A POINT OF CURVATURE; THENCE WESTERLY ALONG AN ARC OF A CURVE CONCAVE TO THE NORTH, HAVING A RADIUS OF 1450.00 FEET, A CENTRAL ANGLE OF 30°55'35", AN ARC DISTANCE OF 782.67 FEET TO A NON TANGENT POINT ON THE WEST LINE OF THE EAST HALF (E. 1/2) OF THE NORTHEAST QUARTER OF SECTION 17, THROUGH WHICH A RADIAL LINE BEARS NORTH 23°19'53" EAST; THENCE NORTH 0°32'10.0" EAST ALONG SAID WEST LINE, 1191.59 FEET TO A POINT ON A LINE THAT IS 40 FEET SOUTH OF AND PARALLEL WITH THE NORTH LINE OF SECTION 17; THENCE NORTH 89°39'59" EAST ALONG SAID PARALLEL LINE, 1332.77 FEET TO THE EAST LINE OF SECTION 17; THENCE SOUTH 0°32'06" WEST ALONG THE WEST LINE OF SECTION 16, A DISTANCE OF 5.00 FEET; THENCE SOUTH 89°48'23" EAST ALONG A LINE THAT IS 45 FEET SOUTH OF AND PARALLEL WITH THE NORTH LINE OF SECTION 16, A DISTANCE OF 1291.24 FEET TO WEST RIGHT-OF-WAY LINE OF SAID KOBLEGARD ROAD; THENCE SOUTH 00°40'23" WEST ALONG SAID WEST LINE, 255.77 FEET; THENCE SOUTH 90°00'00" WEST ALONG SAID RIGHT-OF-WAY LINE, 35.25 FEET TO A NON-TANGENT POINT OF CURVATURE; THROUGH WHICH A LINE, RADIAL TO THE SUBSEQUENT CURVE, BEARS NORTH 89°53'58" WEST; THENCE SOUTHERLY ALONG THE WEST RIGHT-OF-WAY LINE OF KOBLEGARD ROAD BEING AN ARC OF A CURVE CONCAVE TO THE WEST HAVING A RADIUS OF 4950.00 FEET, A CENTRAL ANGLE OF 02°57'46", AN ARC LENGTH OF 255.97 FEET, THENCE NORTH 89°51'26" WEST ALONG THE NORTH LINE OF PARCEL 101 AS DESCRIBED IN SAID OFFICIAL RECORD BOOK 3782, PAGE 2587, A DISTANCE OF 397.71 FEET; THENCE SOUTH 00°40'23" WEST ALONG THE WEST LINE OF SAID PARCEL 101, A DISTANCE OF 666.03 FEET TO THE NORTH RIGHT-OF-WAY LINE OF SAID SPANISH LAKES BOULEVARD; THENCE NORTH 89°51'26" WEST ALONG SAID RIGHT-OF-WAY LINE, 310.57 FEET TO A POINT OF CURVATURE; THENCE WESTERLY ALONG AN ARC OF A CURVE CONCAVE TO THE SOUTH HAVING A RADIUS OF 3050.00 FEET, A CENTRAL ANGLE OF 07°45'16", AN ARC LENGTH OF 412.79 FEET TO A POINT OF TANGENCY; THENCE SOUTH 82°23'16" WEST ALONG THE NORTH RIGHT-OF-WAY LINE OF SAID SPANISH LAKES BOULEVARD, 130.79 FEET TO THE POINT OF BEGINNING.

ABOVE DESCRIBED PARCEL CONTAINS 67.179 ACRES, MORE OR LESS.

SURVEYOR'S NOTES

1. BEARINGS SHOWN HEREON REFER TO N 00°32'06" W ALONG THE EAST SECTION LINE OF SECTION 17, TOWNSHIP 34 SOUTH, RANGE 39 EAST, STATE PLANE GRID SYSTEM. ALL OTHER BEARINGS ARE RELATIVE THERETO.
2. ALL DISTANCES AND BEARINGS SHOWN HEREON ARE GRID DISTANCES AND GRID BEARINGS AND ARE SHOWN IN U.S. SURVEY FEET.
3. THE LANDS SHOWN HEREON WERE NOT ABSTRACTED BY THIS FIRM FOR RIGHTS-OF-WAY, EASEMENTS, OWNERSHIP, OR OTHER INSTRUMENTS OF RECORD THAT MAY AFFECT THE SUBJECT SITE.
4. ALL UNDERGROUND UTILITIES AND FOUNDATIONS ARE NOT LOCATED OR SHOWN.
5. COORDINATES SHOWN HEREON REFER TO THE STATE PLANE COORDINATE SYSTEM 1983 DATUM WITH THE 2011 ADJUSTMENT FOR FLORIDA EAST ZONE.
6. HORIZONTAL AND VERTICAL CONTROL USED: NATIONAL GEODETIC SURVEY (NGS) MONUMENTS "GENESIS" NORTHING = 1165269.01, EASTING = 921027.22, ELEVATION = 22.31; "BC_1_HT" NORTHING = 1159519.65, EASTING = 549855.01, ELEVATION = 22.47
7. THIS SURVEY WAS PERFORMED UTILIZING TRIMBLE REAL TIME KINEMATIC GPS (RTK GPS) SURVEY EQUIPMENT FOR THE HORIZONTAL INFORMATION SHOWN HEREON.
8. SECTIONAL INFORMATION, ROADS & OTHER RIGHTS-OF-WAY WERE DETERMINED FROM REFERENCE TO FDOT RIGHT-OF-WAY MAP ENTITLED: STATE ROAD No. 614 (INDRIO ROAD) SECTION 94004-2501, DATED JANUARY 31, 2013
9. SUBJECT PARCEL, LOCATED IN F.I.R.M. FLOOD ZONE "X" ACCORDING TO FEMA FLOOD MAP #12111C0065J DATED 2/18/2012.
10. AERIAL IMAGERY FROM LABINS (LAND BOUNDARY INFORMATION SYSTEM).
11. LAST DAY OF FIELD SURVEY 11/01/2023.

LAND SURVEYOR'S STATEMENT

WE HEREBY STATE THAT THE PLAT SHOWN HEREON IS A TRUE AND CORRECT REPRESENTATION OF A SURVEY OF THE PROPERTY DESCRIBED IN THE CAPTION THEREOF, MADE UNDER OUR DIRECTION, AND IS ACCURATE TO THE BEST OF OUR KNOWLEDGE AND BELIEF, AND THAT THERE ARE NO APPARENT ENCROACHMENTS, EXCEPT AS SHOWN.

THE UNDERSIGNED HEREBY CERTIFIES THAT THIS SURVEY MEETS THE STANDARDS OF PRACTICE SET FORTH IN CHAPTER 5J-17, F.A.C. BY THE FLORIDA BOARD OF PROFESSIONAL SURVEYORS AND MAPPERS, PURSUANT TO SECTION 472.027, FLORIDA STATUTES.

FRS & ASSOCIATES, INC.
LB 4241

BY: Gary P Williams
Digitally signed by Gary P Williams
DN: C=US, E=gwilliams@frsandassociates.com, O=FRS & ASSOCIATES, INC., CN=Gary P Williams
Date: 2023.11.01 13:07:03 -04'00'

GARY P. WILLIAMS
REGISTERED LAND SURVEYOR
FLORIDA CERTIFICATE NO. 4817
FOR THE FIRM
NOT VALID WITHOUT SURVEYOR'S EMBOSSED SEAL AFFIXED

CLOSURE OF PARCEL 2 NORTH

559 1160496.1073, 835183.0600 POB PARCEL 2-N
S 82-23-16.0 W 570.4598
526 1159422.3394, 834597.6503 P.C.
N 7-38-42.0 W 1450.0000
CC 529 1161859.8588, 834605.8859 DELTA= 30-55-35.0 R= L= 782.6658
S 23-19-53.5 W 1450.0000
530 1160528.2693, 833831.6668 BOUNDARY LINE
N 0-32-19.0 E 1191.5878
537 1161715.8018, 833542.2002 P.L.
N 89-39-59.1 E 1332.3749
535 1161727.5591, 835174.5608 CANAL R/W LOG
S 0-32-06.7 W 4.9982
536 1161722.5632, 835174.5116 CANAL R/W LOG
S 89-48-22.6 E 1291.2359
519 1161718.1089, 835465.7424 NW_COR_GEDNER
S 0-40-23.0 W 255.7710
520 1161462.4456, 835462.7376 KOBLEGARD_RD
S 89-00-00.0 W 35.2481
521 1161462.4456, 835427.4865 P.T.
N 89-08-00.4 W 4950.0000

CLOSURE OF PARCEL 2 NORTH (CONTINUING)

CC 514 1161471.1942, 831177.4973 DELTA= 2-57-45.8 R= L= 255.9665
S 86-50-29.4 E 4950.0000
522 1161208.6661, 830430.4798 P.C.-NON-TANGENT
N 89-51-25.6 W 397.7100
523 1161207.5972, 830032.7122 BOUNDARY_PNT.
S 0-40-23.0 W 666.0300
524 1160541.6131, 829951.5883 BOUNDARY_PNT.
N 89-51-25.6 W 310.5700
525 1160542.3870, 830764.1103 P.C.
S 0-08-34.0 W 3050.0000
CC 526 1157482.3965, 835585.7189 DELTA= 7-45-15.6 R= L= 412.7858
N 7-38-42.0 W 3050.0000
527 1160519.9217, 835202.7213 P.T.
S 82-23-16.0 W 130.7912
528 1160498.1973, 835163.0600 POB PARCEL 2-N

AREA= 2926258.694 SQ.FT.= 67.17767178 ACRES

LEGEND

F.P.F.W.M.D. = FORT PIERCE FARMS WATER CONTROL DISTRICT
R/W = RIGHT-OF-WAY
Δ = DELTA OF CURVE
R = RADIUS POINT OF CURVE
L = LENGTH OF ARC OF CURVE
PC = POINT OF CURVATURE
PRC = POINT OF REVERSE CURVE
PT = POINT OF TANGENCY OF CURVE
PNT = POINT OF NON TANGENT CURVE
● = SET ROD & FRS CAP

F.R.S. & ASSOCIATES, INC.
LAND SURVEYORS AND MAPPERS
1343 U.S. HIGHWAY 1, SUITE 4
VERO BEACH, FLORIDA 32960
PHONE (561) 478-2178
www.frsandassociates.com

BOUNDARY AND TOPOGRAPHICAL SURVEY OF BEDNER FARMS

NO.	DATE:	REVISIONS:	BY:
1	11/01/2023	UPDATED TOPO, ADJ. SURFACE & ADDED SURF. INFO	J.C.S.
2	04/20/2024	PARCEL 2 NORTH SEPARATE ENTITY	J.C.S.

DRAWN BY: J. C. MOLLA
INSPECTED BY: C. P. WILLIAMS
SCALE: 1" = 200'
DATE: 11/01/2023
FIELD BOOK/PAGE: GPS COLLECTED
JOB NUMBER: D 22-005.C
SHEET: 1 OF 2

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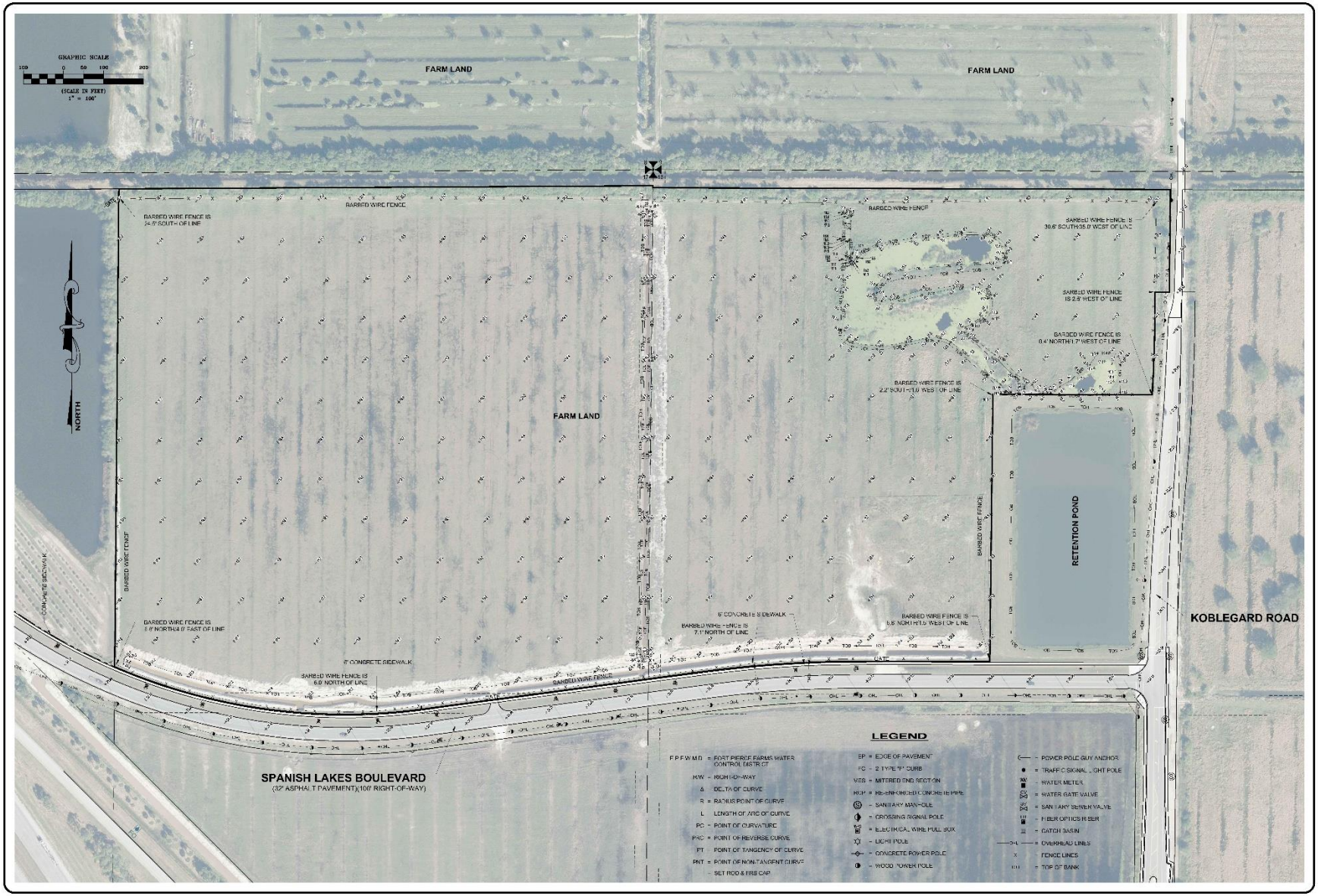

F.R.S. & ASSOCIATES, INC.
LAND SURVEYORS AND LAND PLANNERS
CERTIFICATE OF AUTHORIZATION NO. LB 4541
1968 S. 25th STREET - FORT PIERCE, FLORIDA 34947
PHONE (561) 467-7870
WEB SITE: www.frsinc.com

BOUNDARY AND TOPOGRAPHICAL SURVEY OF BEDNER FARMS

REVISIONS			
J.G.S.	2409/2023	PARCEL 3 NORTH AS SEPARATE PARTY	
T.C.M.	3/31/2023	UPDATED TOPO ADJ. SHEETS 1 & 2 ADDED SHEET 3	
BY:	DATE:		

DRAWN BY:
T. C. MULLIN
APPROVED BY:
G. P. WILLIAMS
SCALE:
1" = 100'
DATE:
1/9/2023
* OLD BOOK/PAGES
GPS COLLECTED

JOB NUMBER:
D 22-005.C

SHEET
2 OF 2

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

4

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

4A

USA TODAY CO.

LocaliQ

PO Box 631244 Cincinnati, OH 45263-1244

AFFIDAVIT OF PUBLICATION

Ruth Viola
The Groves of St Lucie County CDD
2300 Glades RD
Suite 410W
Boca Raton FL 33431-7386

STATE OF WISCONSIN, COUNTY OF BROWN

Before the undersigned authority personally appeared, who on oath says that he or she is the Legal Advertising Representative of the Indian River Press Journal/St Lucie News Tribune/Stuart News, newspapers published in Indian River/St Lucie/Martin Counties, Florida; that the attached copy of advertisement, being a Legal Ad in the matter of , was published on the publicly accessible websites of Indian River/St Lucie/Martin Counties, Florida, or in a newspaper by print in the issues of, on:

SCN StLucie-IndianRv-Stuart 03/02/2026, 03/09/2026

Affiant further says that the website or newspaper complies with all legal requirements for publication in chapter 50, Florida Statutes.
Subscribed and sworn to before me, by the legal clerk, who is personally known to me, on 03/09/2026

Legal Clerk

Notary, State of WI, County of Brown

9-3-29

My commission expires

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KONGMENG YANG
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State of Wisconsin

NOTICE OF PUBLIC HEARINGS TO CONSIDER THE IMPOSITION OF SPECIAL ASSESSMENTS PURSUANT TO SECTIONS 170.07 AND 197.3632, *FLORIDA STATUTES*, BY THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT

NOTICE OF SPECIAL MEETING OF THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT

In accordance with Chapters 170, 190 and 197, *Florida Statutes*, the Groves of St. Lucie County Community Development District's ("**District**") Board of Supervisors ("**Board**") hereby provides notice of the following public hearings and public meeting:

NOTICE OF PUBLIC HEARINGS

DATE:	March 30, 2026
TIME:	11:00 a.m.
LOCATION:	Fairfield Inn & Suites – Fort Pierce 6502 Metal Drive Fort Pierce, Florida 34945

The purpose of the public hearings announced above is to consider the imposition of special assessments ("**Debt Assessments**"), and adoption of assessment rolls to secure proposed bonds, on benefited lands within the District, and, to provide for the levy, collection and enforcement of the Debt Assessments. The proposed bonds secured by the Debt Assessments are intended to finance certain public infrastructure improvements, including, but not limited to, stormwater management, water and sewer utilities, landscape, irrigation, lighting, and other infrastructure improvements (together, "**Project**"), benefitting certain lands within the District. The Project is described in more detail in the *Engineer's Report* ("**Engineer's Report**"). Specifically, the Project includes a Capital Improvement Plan to provide public infrastructure benefitting all lands within the District, as identified in the Engineer's Report. The Debt Assessments are proposed to be levied as one or more assessment liens and allocated to the benefitted lands within the District, as set forth in the *Master Special Assessment Methodology Report* ("**Assessment Report**"). At the conclusion of the public hearings, the Board will, by resolution, levy and impose assessments as finally approved by the Board. A special meeting of the District will also be held where the Board may consider any other business that may properly come before it.

The District is located entirely within St. Lucie County, Florida, and consists of approximately 112.332 +/- acres. The site is generally located East of I-95, North of Indrio Road, and West of Johnson Road. A geographic depiction of the District is shown below. All lands within the District are expected to be improved in accordance with the reports identified above.

A description of the property to be assessed and the amount to be assessed to each piece or parcel of property may be ascertained at the "**District's Office**" located at c/o Wrathell, Hunt and Associates, LLC, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431 (877)276-0889. Also, a copy of the agendas and other documents referenced herein may be obtained from the District Office.

Proposed Debt Assessments

The proposed Debt Assessments are in the total principal amount of **$96,765,000** (not including interest or collection costs), and are as follows:

Product Type	Number of Units	ERU	Maximum Principal Bond Assessments per Unit	Maximum Annual Bond Assessments per Unit
Townhome	154	0.50	$106,522.46	$9,462.12
Single Family 35	154	0.70	$149,131.44	$13,246.96
Single Family 40	173	0.80	$170,435.93	$15,139.39
Single Family 50	131	1.00	$213,044.91	$18,924.23

*Amount includes principal only, and not interest or collect costs

**Amount includes estimated 3% County collection costs and 4% early payment discounts

The assessments shall be paid in no more than thirty (30) annual installments subsequent to the issuance of debt to finance the improvements. These annual assessments will be collected on the County tax roll by the Tax Collector. Alternatively, the District may choose to directly collect and enforce these assessments.

The public hearings and meeting are open to the public and will be conducted in accordance with Florida law. The public hearings and meeting may be continued to a date, time, and place to be specified on the record. There may be occasions when staff or board members may participate by speaker telephone. Any person requiring special accommodations because of a disability or physical impairment should contact the District Office at least forty-eight (48) hours prior to the meeting. If you are hearing or speech impaired, please contact the Florida Relay Service by dialing 7-1-1, or 1-800-955-8771 (TTY) / 1-800-955-8770 (Voice), for aid in contacting the District Office.

Please note that all affected property owners have the right to appear and comment at the public hearings and meeting, and may also file written objections with the District Office within twenty (20) days of issuance of this notice. Each person who decides to appeal any decision made by the Board with respect to any matter considered at the public hearings or meeting is advised that person will need a record of proceedings and that accordingly, the person may need to ensure that a verbatim record of the proceedings is made, including the testimony and evidence upon which such appeal is to be based.

District Manager

RESOLUTION 2026-03

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

WHEREAS, the Groves of St. Lucie County Community Development District ("**District**") is a local unit of special-purpose government organized and existing under and pursuant to Chapter 190, *Florida Statutes*; and

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

WHEREAS, the District hereby determines to undertake, install, plan, establish, construct or reconstruct, enlarge or extend, equip, acquire, operate, and/or maintain the portion of the infrastructure improvements comprising the District's overall capital improvement plan as described in the District *Engineer's Report* ("**Project**"), which is attached hereto as **Exhibit A** and incorporated herein by reference; and

WHEREAS, it is in the best interest of the District to pay for all or a portion of the cost of the Project by the levy of special assessments ("**Assessments**") using the methodology set forth in that *Master Special Assessment Methodology Report*, which is attached hereto as **Exhibit B**, incorporated herein by reference, and on file with the District Manager at c/o Wrathell, Hunt & Associates, LLC, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431 ("**District Records Office**");

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT:

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

2. **DECLARATION OF ASSESSMENTS.** The Board hereby declares that it has determined to undertake the Project and to defray all or a portion of the cost thereof by the Assessments

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

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

A. The total estimated cost of the Project is **$70,500,000** ("**Estimated Cost**").

B. The Assessments will defray approximately **$96,765,000**, which is the anticipated maximum par value of any bonds and which includes all or a portion of the Estimated Cost, as well as other financing-related costs, as set forth in **Exhibit B**, and which is in addition to interest and collection costs. On an annual basis, the Assessments will defray no more than **$8,595,387** per year exclusive of costs of collection and early payment discount allowance, again as set forth in **Exhibit B**.

C. The manner in which the Assessments shall be apportioned and paid is set forth in **Exhibit B**, as may be modified by supplemental assessment resolutions. The Assessments will constitute a "master" lien, which may be imposed without further public hearing in one or more separate liens each securing a series of bonds, and each as determined by supplemental assessment resolution. With respect to each lien securing a series of bonds, the special assessments shall be paid in not more than (30) thirty yearly installments. The special assessments may be payable at the same time and in the same manner as are ad-valorem taxes and collected pursuant to Chapter 197, *Florida Statutes*; provided, however, that in the event the uniform non ad-valorem assessment method of collecting the Assessments is not available to the District in any year, or if determined by the District to be in its best interest, the Assessments may be collected as is otherwise permitted by law, including but not limited to by direct bill. The decision to collect special assessments by any particular method – e.g., on the tax roll or by direct bill – does not mean that such method will be used to collect special assessments in future years, and the District reserves the right in its sole discretion to select collection methods in any given year, regardless of past practices.

5. **DESIGNATING THE LANDS UPON WHICH THE SPECIAL ASSESSMENTS SHALL BE LEVIED.** The Assessments securing the Project shall be levied on the lands within the District, as described in **Exhibit B**, and as further designated by the assessment plat hereinafter provided for.

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

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

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

NOTICE OF PUBLIC HEARINGS

DATE:	March 30, 2026
TIME:	11:00 a.m.
LOCATION:	Fairfield Inn & Suites – Fort Pierce 6502 Metal Drive Fort Pierce, Florida 34945

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

Notice of said hearings shall be advertised in accordance with Chapters 170, 190 and 197, *Florida Statutes*, and the District Manager is hereby authorized and directed to place said notice in a newspaper of general circulation within the County in which the District is located (by two publications one week apart with the first publication at least twenty (20) days prior to the date of the hearing established herein). The District Manager shall file a publisher's affidavit with the District Secretary verifying such publication of notice. The District Manager is further authorized and directed to give thirty (30) days written notice by mail of the time and place of this hearing to the owners of all property to be assessed and include in such notice the amount of the assessment for each such property owner, a description of the areas to be improved and notice that information concerning all assessments may be ascertained at the District Records Office. The District Manager shall file proof of such mailing by affidavit with the District Secretary.

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

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

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

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

PASSED AND ADOPTED this 22nd day of January, 2026.

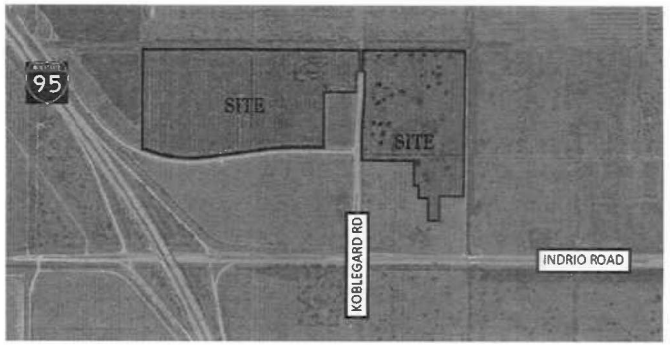
ATTEST:

/s/ Chris Conti
Secretary/Assistant Secretary

THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT

/s/ Michael Folstein
Chair/Vice Chair, Board of Supervisors

Exhibit A: *Engineer's Report*
Exhibit B: *Master Special Assessment Methodology Report*



TR-43547278

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

4B

STATE OF FLORIDA)
COUNTY OF PALM BEACH)

AFFIDAVIT OF MAILING

BEFORE ME, the undersigned authority, this day personally appeared Curtis Marcoux, who by me first being duly sworn and deposed says:

1. I am over eighteen (18) years of age and am competent to testify as to the matters contained herein. I have personal knowledge of the matters stated herein.

2. I, Curtis Marcoux, am employed by Wrathell Hunt & Associates, LLC, and, in the course of that employment, serve as Financial Analyst for The Groves of St. Lucie County Community Development District ("**District**").

3. Among other things, my duties include preparing and transmitting correspondence relating to the District.

4. I do hereby certify that on February 27, 2026, and in the regular course of business, I caused letters, in the forms attached hereto as **Exhibit A**, to be sent notifying affected landowner(s) in the District of their rights under Chapters 170, 190 and 197, *Florida Statutes*, with respect to the District's anticipated imposition of assessments. I further certify that the letters were sent to the addressees identified in **Exhibit B** and in the manner identified in **Exhibit A.**

5. I have personal knowledge of having sent the letters to the addressees, and those records are kept in the course of the regular business activity for my office.

FURTHER AFFIANT SAYETH NOT.

By: Curtis Marcoux

SWORN AND SUBSCRIBED before me by means of ☑ physical presence or ☐ online notarization this 27th day of February 2026, by Curtis Marcoux, for Wrathell Hunt & Associates, LLC, who ☑ is personally known to me or ☐ has provided _____ as identification, and who ☐ did or ☑ did not take an oath.

DAPHNE GILLYARD
Notary Public
State of Florida
Comm# HH390392
Expires 8/20/2027

NOTARY PUBLIC

Print Name: Daphne Gillyard
Notary Public, State of Florida
Commission No.: HH390392
My Commission Expires: 8/20/2027

EXHIBIT A: Copies of Forms of Mailed Notices
EXHIBIT B: List of Addressee

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S7 GROVES LLC
11509 HIGHLAND FARM RD
POTOMCA, MD 20854

PS Form 3800, January 2023 PSN 7530-02-000-9047 See Reverse for Instructions

9589 0710 5270 2050 8379 23

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WOODLAND STATION BOCA RATON, FL
FEB 27 2026
33431-USPS
Postmark Here

FRIENDS 2 LLC
11430 US HIGHWAY 1
NORTH PALM BEACH, FL
33408-3226

PS Form 3800, January 2023 PSN 7530-02-000-9047 See Reverse for Instructions

9589 0710 5270 2050 8379 16

The Groves of St Lucie County
Community Development District
OFFICE OF THE DISTRICT MANAGER
2300 Glades Road, Suite 410W●Boca Raton, Florida 33431
Phone: (561) 571-0010●Toll-free: (877) 276-0889●Fax: (561) 571-0013

Via First Class U.S. Mail

February 26, 2026

Friends 2 LLC
11430 US Highway 1
North Palm Beach, FL 33408-3226

Property Appraiser PINs: **1317-111-0003-000-8, 1316-221-0002-000-6, 1316-211-0001-000-8**

RE: The Groves of St. Lucie County Community Development District ("District")
Notice of Hearings on Debt Assessments

Dear Property Owner:

In accordance with Chapters 170, 190 and 197, *Florida Statutes*, the District's Board of Supervisors ("**Board**") hereby provides notice of the following public hearings, and public meeting:

NOTICE OF PUBLIC HEARINGS

DATE:	March 30, 2026
TIME:	11:00 a.m.
LOCATION:	Fairfield Inn & Suites – Fort Pierce 6502 Metal Drive Fort Pierce, Florida 34945

The purpose of the public hearings announced above is to consider the imposition of special assessments ("**Debt Assessments**"), and adoption of assessment rolls to secure proposed bonds, on certain benefited lands within the District, and, to provide for the levy, collection and enforcement of the Debt Assessments. The proposed bonds secured by the Debt Assessments are intended to finance certain public infrastructure improvements, including, but not limited to, stormwater management, water and sewer utilities, landscape, irrigation, lighting, and other infrastructure improvements (together, "**Project**"), benefitting certain lands within the District. The Project is described in more detail in the *Engineer's Report* ("**Engineer's Report**"). Specifically, the Project includes a Capital Improvement Plan to provide public infrastructure benefitting all lands within the District, as identified in the Engineer's Report. The Debt Assessments are proposed to be levied as one or more assessment liens and allocated to the benefitted lands within the District, as set forth in the *Master Special Assessment Methodology Report* ("**Assessment Report**"). Copies of the Engineer's Report and Assessment Report are attached hereto. As required by Chapters 170, 190 and 197, *Florida Statutes*, the Assessment Report, together with the Engineer's Report, describe in more detail the purpose of the Debt Assessments; the total amount to be levied against each parcel of land within the District; the units of measurement to be applied against each parcel to determine the Debt Assessments; the number of such units contained within each parcel; and the total revenue the District will collect by the Debt Assessments. At the conclusion of the public hearings, the Board will, by resolution, levy and impose the Debt Assessments as finally approved by the Board. A special meeting of the District will also be held where the Board may consider any other business that may come before it.

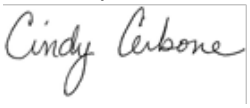
The Debt Assessments constitute a lien against benefitted property located within the District just as do each year's property taxes. For the Debt Assessments, the District may elect to have the County Tax Collector collect the assessments, or alternatively may collect the assessments by sending out an annual bill. For delinquent assessments that were initially directly billed by the District, the District may initiate a foreclosure action or may place the delinquent assessments on the next year's county tax bill. IT IS IMPORTANT TO PAY YOUR ASSESSMENT BECAUSE FAILURE TO PAY WILL CAUSE A TAX CERTIFICATE TO BE ISSUED AGAINST THE PROPERTY WHICH MAY RESULT IN LOSS OF TITLE, OR FOR DIRECT BILLED ASSESSMENTS, MAY RESULT IN A FORECLOSURE ACTION, WHICH ALSO MAY RESULT IN A LOSS OF TITLE. The District's decision to collect assessments on the tax roll or by direct billing does not preclude the District from later electing to collect those or other assessments in a different manner at a future time.

The District is located entirely within St. Lucie County, Florida, and consists of approximately 112.332 +/- acres. The site is generally located east of I-95, north of Indrio Road, and west of Johnson Road. All lands within the District are expected to be improved in accordance with the reports identified above. A geographic description of the property to be assessed and the amount to be assessed to each piece or parcel of property may be ascertained at the "**District's Office**" located at c/o Wrathell, Hunt and Associates, LLC, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431 (877) 276-0889. Also, a copy of the agendas and other documents referenced herein may be obtained from the District Office.

The public hearings and meeting are open to the public and will be conducted in accordance with Florida law. The public hearings and meeting may be continued to a date, time, and place to be specified on the record. There may be occasions when staff or board members may participate by speaker telephone. Any person requiring special accommodations because of a disability or physical impairment should contact the District Office at least forty-eight (48) hours prior to the meeting. If you are hearing or speech impaired, please contact the Florida Relay Service by dialing 7-1-1, or 1-800-955-8771 (TTY) / 1-800-955-8770 (Voice), for aid in contacting the District Office.

Please note that all affected property owners have the right to appear and comment at the public hearings and meeting, and may also file written objections with the District Office within twenty (20) days of issuance of this notice. Each person who decides to appeal any decision made by the Board with respect to any matter considered at the public hearings or meeting is advised that person will need a record of proceedings and that accordingly, the person may need to ensure that a verbatim record of the proceedings is made, including the testimony and evidence upon which such appeal is to be based. If you have any questions, please do not hesitate to contact the District Office.

Sincerely,



Cindy Cerbone
District Manager

ATTACHMENTS: Engineer's Report and Assessment Report (with Legal Descriptions of Lands)

The Groves of St Lucie County
Community Development District
OFFICE OF THE DISTRICT MANAGER
2300 Glades Road, Suite 410W●Boca Raton, Florida 33431
Phone: (561) 571-0010●Toll-free: (877) 276-0889●Fax: (561) 571-0013

Via First Class U.S. Mail

February 26, 2026

S7 Grove LLC
11509 HIGHLAND FARM ROAD
POTOMCA, MD 20854

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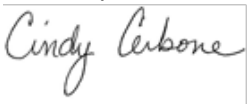

Cindy Cerbone
District Manager

ATTACHMENTS: Engineer's Report and Assessment Report (with Legal Descriptions of Lands)

The Groves of St. Lucie County CDD -

The Groves of St. Lucie County Community Development District

Engineer's Report
of Infrastructure Improvements
Dated: February ___, 2026

Prepared For:

The Groves of St. Lucie County Community Development District
Board of Supervisors
St. Lucie County, Florida

Prepared By:

Kimley»Horn

445 24th Steet, Suite 200
Vero Beach, FL 32960
Main: 772-794-4100

Direct: 772-794-4117
Email: alex.daugherty@kimley-horn.com

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- Lake Excavation
- Onsite Roadway Improvements
- Offsite Roadway Improvements
- Wet Utilities (Water and Wastewater)
- Hardscape, Landscape, and Irrigation
- Dry Utilities (Streetlights and Electrical)
- Environmental Considerations
- Recreational Amenities
- Professional Services

IV. Permitting Status

V. CIP Cost Estimate / Maintenance Responsibilities

VI. **Conclusions**

VII. **Engineer's Certification**

SECTION I

INTRODUCTION AND PROJECT DESCRIPTION

The Groves of St. Lucie County Community Development District ("CDD" or "District") was created for the purpose of financing and managing the construction and maintenance of public infrastructure for the Grove Residential Development, a ± 112.332-acre [TAKEN FROM ORDINANCE LEGAL] residential development located generally north of Indrio Road and east of I-95 in St. Lucie County Florida. For permitting purposes, the overall proposed subdivision was divided into two different sites ("The Grove NW" and "The Grove NE"), but they are both part of the overall community. The Grove NW site is situated northwest of the intersection of Spanish Lakes Boulevard and Koblegard Road, while The Grove NE site is situated northeast of the intersection.

The overall development will consist of the construction of 612 total units (154 35-foot single family lots, 173 40-foot single family lots, 131 50-foot single family lots, and 154 townhome units) as summarized in the table below:

PRODUCT TYPES

Product Type	District Totals
35' Single-Family Lot	154
40' Single-Family Lot	173
50' Single-Family Lot	131
Townhome Units	154
TOTAL UNITS:	612

The public infrastructure necessary to develop the CDD includes the following:

- A stormwater management system that consists of a network of lakes and interconnected storm inlets and pipes
- Roadway improvements including irrigation and landscaping
- A water distribution system
- A sanitary sewer collection and transmission system including two lift stations (one for "The Grove NW" and one for "The Grove NE")
- Offsite roadway improvements consisting of proposed utilities, a roundabout, and street lighting
- Environmental improvements
- Recreational Tract Improvements

These infrastructure improvements will provide service to the CDD. The estimated cost of these public improvements is $70,500,000 as further detailed in this Engineer's Report (sometimes collectively referred to as the "Project" or the "CIP"). This cost identifies the current intentions of the District and is subject to change based upon various factors such as development plans, permitting and market conditions. Kimley-Horn and Associates, Inc. has no control over the cost of labor, materials, equipment, or services furnished by others, or over methods of determining price, or over competitive bidding or market conditions. Any and all professional opinions as to costs reflected herein, including but not limited to professional opinions as to the costs of construction materials, are made on the basis of professional experience and available data. Kimley-Horn and Associates, Inc. cannot and does not guarantee or warrant that actual costs will not vary from the professional opinions of costs shown herein.

SECTION II

PURPOSE AND SCOPE

The purpose of this Engineer's Report is to outline the infrastructure improvements and associated costs of the Project. The District Engineer has considered, and, in certain instances, relied upon opinions, information, and documentation prepared or supplied by others, which may have included the developer, contractors, surveyors, legal counsel, and the District's Board of Supervisors, staff, and consultants.

SECTION III

DESCRIPTION OF IMPROVEMENTS

Stormwater Management System

The surface water management system will consist of inlets, manholes and storm pipes that direct runoff to the on-site lake system for stormwater treatment and attenuation. This system also includes pumps for stormwater harvesting as well as control structure that discharges to the Fort Pierce Farms Water Control District (FPFWCD) maintained canals. The FPFWCD shall be responsible for the maintenance of the outfall pipe and lake bank along Canals 1 and 13 for both sites. The stormwater system will be designed consistently with the applicable design requirements for stormwater/floodplain management systems per South Florida Water Management District (SFWMD) and FPFWCD requirements. The stormwater management system will be situated within tracts or easements that will be granted to the CDD. The District will finance, own and maintain the stormwater system.

Lake Excavation

The lake excavation for the Project will consist of the contractor's mobilization, supervision, clearing and grubbing, demolition, dewatering, lake excavation to a minimum of 12 feet and a maximum of 60 feet below design water level (consistent with the approved Environmental Resource Permits) and stockpiling the material adjacent to the lake for construction of the infrastructure. These activities also include storm water pollution prevention measures. The excavated material will be used onsite as fill to help balance the earthwork.

NOTE: The District will finance costs of importing fill solely related to the stormwater management systems. Any costs of importing any fill for use to develop private lots will not be financed by CDD tax-exempt debt.

Onsite Roadway Improvements

The CIP includes subdivision roads within the District. Generally, all roads will be 2-lane un-divided roads. Such roads include the roadway asphalt, base, and subgrade, roadway curb and gutter, striping and signage and sidewalks within rights-of-way abutting non-lot lands. Sidewalks abutting lots will be constructed by the homebuilders. All roads will be designed in accordance with applicable St. Lucie County and Florida Department of Transportation (FDOT) design requirements.

All internal roadways may be financed by the District. Collector roads are intended to be dedicated to a local general purpose unit of government for ownership, operation, and maintenance, while the District anticipates owning and operating all other roads.

Offsite Roadway Improvements

The offsite roadway improvements involve extending the existing four-lane Koblegard Road north to the intersection with Spanish Lakes Boulevard, where a roundabout will be constructed to improve traffic circulation. Additionally, the current two-lane portion of Koblegard Road will be further extended north to the FPFWCD canal #13. These improvements also include the installation of a forcemain and watermain along Spanish Lakes Boulevard and Koblegard Road as well as associated drainage infrastructure.

Wet Utilities (Water and Wastewater)

As part of the CIP, the District intends to construct and/or acquire from the Developer water and wastewater infrastructure for conveyance to the County for final ownership and operation. In particular, the on-site water distribution system will consist of 8" diameter C-900 PVC mains, fire hydrants, and water services to all the lots for potable service and fire protection. The onsite water distribution system will be located within rights-of-way and utility easements.

Commented [AD1]: Kutak Rock to confirm the "and/or acquire" is in regards to the transfer between developer and CDD, not acquiring from the County for perpetual ownership/maintenance.

The wastewater conveyance system will feature an 8-inch PVC gravity sewer that directs wastewater to lift stations located on both sites. At each lift station, sewage is pumped through a 6-inch HDPE force main—from the onsite wet wells—to a designated connection point: Spanish Lakes Boulevard for The Grove NW and Koblegard Road for The Grove NE. The offsite force main along Spanish Lakes Boulevard will link with the force main along Koblegard Road, which then connects to the existing 12-inch force main at the northeast corner of Indrio Road and Koblegard Road.

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

Commented [AD2]: Kutak Rock to confirm the "and/or acquire" is in regards to the transfer between developer and CDD, not acquiring from the County for perpetual ownership/maintenance.

Hardscape, Landscape, and Irrigation

The District will construct and/or install landscaping, irrigation and hardscaping within District common areas and rights-of-way. The District is required to adhere to local standards for planting and irrigation design. In practice, the landscaping and irrigation on these sites will comply with these regulations for the benefit of the community.

The District will own, maintain, and fund all landscaping, irrigation, hardscaping, and stormwater harvesting systems (pumps and supplemental wet wells for lake recharge), as permitted by SFWMD. Such infrastructure, to the extent that it is located in rights-of-way owned by a local general-purpose government, will be maintained pursuant to a right-of-way agreement or permit.

Dry Utilities (Streetlights and Electrical)

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

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

Environmental Considerations

No onsite conservation areas or payments to private wetland mitigation banks are required to offset wetland and surface water impacts associated with the construction of the development. The listed species surveys dated July 22, 2025 by Atlantic Environmental found no evidence of gopher tortoise or crested caracaras habitat within the project site. No wading bird species were identified using the project site, with the exception of Wood Storks. Stormwater lakes were designed with lake littoral to provide foraging habitat for Wood Storks, the lake littoral acreage provides no net loss of existing foraging habitat. The District will be responsible for the design, permitting, construction, maintenance, and government reporting of the environmental mitigation. These costs are included within the CIP.

Recreational Amenities

As part of the overall development, the District may elect to construct and/or acquire a clubhouse and other amenity facilities. Any District funded clubhouse or other amenity facilities will be open to the public and will be owned, operated and maintained by the District. Alternatively, the Developer may privately fund such facilities and, upon completion, transfer them to a homeowners' association for ownership, operation and maintenance. In such events, the amenities would be considered common elements for the exclusive benefit of the District landowners.

Professional Services

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

NOTE: In the event that impact fee credits are generated from any roadway, utilities or other improvements funded by the District, or the District funds any utility connection fees, any such resulting credits, will be the subject of an acquisition agreement between the applicable developer and the District whereby the District will either receive the credits or the equivalent value of the credits at no cost to the District.

SECTION IV

PERMITTING STATUS

All necessary permits for the construction of the CIP have either been obtained or are expected to be obtained. Please see summary of permits below:

The Grove NW:

- United States Army Corps of Engineers – Received
- South Florida Water Management District ERP Individual Permit – Received
- South Florida Water Management District CUP (Irrigation/Dewatering) – Received
- St Lucie County Site Development Permit – In Review
- St Lucie County Vegetation Removal Permit – In Review
- St Lucie County Fire – Received
- Fort Pierce Farms Water Control District Drainage Permit – Received
- Florida Department of Environmental Protection Water and Sewer – Pending Initial Submittal
- St Lucie County Preliminary Plat – In Review
- St Lucie County Final Plat – Pending Initial Submittal

The Grove NE:

- United States Army Corps of Engineers – Received
- South Florida Water Management District ERP Individual Permit – Received
- South Florida Water Management District CUP (Irrigation/Dewatering) – Received
- St Lucie County Site Development Permit – In Review
- St Lucie County Vegetation Removal Permit – In Review
- St Lucie County Fire – Received
- Fort Pierce Farms Water Control District Drainage Permit – Received
- Florida Department of Environmental Protection Water and Sewer – Pending Initial Submittal
- St Lucie County Preliminary Plat – In Review
- St Lucie County Final Plat – Pending Initial Submittal

Amenity Center (The Grove NE):

- South Florida Water Management District ERP Individual Permit – Received
- St Lucie County Site Development Permit – In Review
- St Lucie County Vegetation Removal Permit – In Review
- St Lucie County Fire – Approved

Offsite Improvements:

- Florida Department of Transportation Drainage Permit – In Review
- St Lucie County Right-of-Way Permit for Roundabout / Road Extension – In Review
- St Lucie County Offsite Utility Permit – In Review
- South Florida Water Management District ERP Individual Permit – In Review

SECTION V

CIP COST ESTIMATES / MAINTENANCE RESPONSIBILITIES

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

CIP COST ESTIMATE

Improvement	Cost Estimate	Ownership and Maintenance Entity
Stormwater Management	$14,000,000	CDD
Roadways	$7,500,000	County
Water & Wastewater Utilities	$10,000,000	County
Undergrounding of Conduit	$1,500,000	CDD
Hardscape/Landscape/Irrigation	$5,000,000	CDD
Conservation Areas	-	CDD
Amenity	$3,250,000	CDD
Off-Site Improvements	$7,500,000	County
Professional Services	$1,750,000	CDD
Utility Connection Fees	$8,250,000	CDD
Contingency	$11,750,000	As above
TOTAL	**$70,500,000**	

a. The probable costs estimated herein do not include anticipated carrying cost, interest reserves or other anticipated CDD expenditures that may be incurred.
b. The developer reserves the right to finance any of the improvements outlined above, and have such improvements owned and maintained by a property owner's or

homeowner's association, in which case such items would not be part of the CIP.

c. The District may enter into an agreement with a third-party, or an applicable property owner's or homeowner's association, to maintain any District-owned improvements, subject to the approval of the District's bond counsel.
d. Impact fee or utility credits may be available from master roadway and utility improvements or other payments. The developer and the District will enter into an acquisition agreement whereby the developer may elect to keep any such credits, provided that consideration is provided to the District in the form of improvements, land, a prepayment of debt assessments, or other consideration.

SECTION VI

CONCLUSIONS

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

It is further our opinion that:

- The estimated cost of the CIP as set forth herein is reasonable based on prices currently being experienced in the jurisdiction in which the District is located, and is not greater than the lesser of the actual cost of construction or the fair market value of such infrastructure;

- All of the improvements comprising the CIP are required by applicable development approvals issued pursuant to Section 380.06, Florida Statutes;

- The CIP is feasible to construct, there are no technical reasons existing at this time that would prevent the implementation of the CIP, and it is reasonable to assume that all necessary regulatory approvals will be obtained in due course; and

- The assessable property within the District will receive a special benefit from the CIP that is at least equal to such costs.

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

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

Please note that the CIP as presented herein is based on current plans and market conditions which are subject to change. Accordingly, the CIP, as used herein, refers to sufficient public infrastructure of the kinds described herein (i.e., stormwater/floodplain management, sanitary sewer, potable water, etc.) to support the development and sale of the planned residential units in the District, which (subject to true-

up determinations) number and type of units may be changed with the development of the site. Stated differently, during development and implementation of the public infrastructure improvements as described for the District, it may be necessary to make modifications and/or deviations for the plans, and the District expressly reserves the right to do so.

SECTION VII

ENGINEER'S CERTIFICATION

It is our opinion that the extent of proposed improvements and their estimated costs are fair and reasonable and provide a direct and special benefit to the properties located within the District. We believe that those improvements not yet completed can be permitted, constructed, and installed at the estimated costs described in the report.

I hereby certify that the foregoing instrument is a true and correct copy of the Engineer's Report of The Groves of St. Lucie County Community Development District.

Sincerely,

Alex Daugherty, P.E.

KIMLEY-HORN AND ASSOCIATES, INC.

THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT

Master Special Assessment
Methodology Report

February 20, 2026

Provided by:

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1.0 Introduction

1.1 Purpose

This Master Special Assessment Methodology Report (the "Report") was prepared to provide a master financing plan and a master special assessment methodology for The Groves of St. Lucie County Community Development District (the “District”), located entirely within St. Lucie County, Florida (the “County”), as related to funding the costs of public infrastructure improvements (the “Capital Improvement Plan” or “CIP”) contemplated to be provided by the District.

1.2 Scope of the Report

This Report presents the projections for financing the District's CIP described in The Groves of St. Lucie County Community Development District Bond Validation Engineer’s Report of Infrastructure Improvements prepared by Kimley-Horn and Associates, Inc. (the “District Engineer”) and dated February 2026, as may be amended and supplemented from time to time (the “Engineer's Report”), as well as describes the method for the allocation of special benefits and the apportionment of special assessment debt resulting from the provision and funding of the CIP.

1.3 Special Benefits and General Benefits

The improvements undertaken and funded by the District as part of the CIP create direct special and peculiar benefits to the assessable lands within its borders, different in kind and degree than general benefits for properties outside of its borders as well as general benefits to the public at large. However, as discussed within this Report, these general benefits are incidental in nature and are readily distinguishable from the direct special and peculiar benefits which accrue to the assessable property within the District. The District’s CIP enables properties within its boundaries to be developed.

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

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

1.4 Organization of the Report

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

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

Section Four discusses the financing program for the District.

Section Five introduces the special assessment methodology for the District.

2.0 Development Program

2.1 Overview

The District serves the Groves of St. Lucie County development (the "Development" or "The Groves of St. Lucie County"), a master planned residential development located entirely within St. Lucie County, Florida. The land within the District consists of approximately 112.332 +/- acres and is generally located north of Indrio Road and east of I-95.

2.2 The Development Program

The development of The Groves of St. Lucie County is anticipated to be conducted by S7 Grove, LLC or an affiliated entity (the "Developer"). Based upon the information provided by the Developer and the District Engineer, the current development plan envisions 154 Townhomes, 154 Single-family 35' units, 173 Single-family 40' units, and 131 Single-family 50' units for a total of 612 residential units to be developed over a multi-year period in one or more development phases, although unit numbers, land use types, and phasing may change throughout the development period. Table 1 in

the *Appendix* illustrates the current development plan for The Groves of St. Lucie County.

3.0 The Capital Improvement Plan

3.1 Overview

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

3.2 Capital Improvement Plan

The CIP needed to serve the Development is projected to consist of master improvements which will serve all of the lands in the District. The District, however, reserves the right to create distinct assessment areas to coincide with the phases of development. The CIP will consist of stormwater management, roadways, water & wastewater utilities, undergrounding of conduit, hardscape/ landscape/ irrigation, conservation areas, amenity, off-site improvements, and utility connection fees, along with professional services and contingency, which cumulatively are estimated by the District Engineer at $70,500,000.

The public infrastructure improvements that comprise the CIP will serve and provide a direct benefit to all land uses in the District and will comprise an interrelated system of improvements, which means all of improvements will serve the entire District and improvements will be interrelated such that they will reinforce one another.

Table 2 in the *Appendix* illustrates the specific components of the CIP**.**

4.0 Financing Program

4.1 Overview

As noted above, the District is embarking on a program of public capital improvements which will facilitate the development of lands within the District. Generally, construction of public improvements is either funded by the Developer and then acquired by the District or funded directly by the District. The choice of the exact mechanism

for providing the public infrastructure has not yet been made at the time of this writing, and the District may either acquire the public infrastructure from the Developer or construct it, or partly acquire it and partly construct it.

Even though the actual financing plan may change to include multiple series of bonds, it is likely that in order to fully fund costs of the CIP as described in *Section 3.2* in one financing transaction, the District would have to issue approximately $96,765,000 in par amount of special assessment bonds (the "Bonds").

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

4.2 Types of Bonds Proposed

The proposed financing plan for the District provides for the issuance of the Bonds in the approximate principal amount of $96,765,000 to, among other things, finance approximately $70,500,000 in CIP costs. The Bonds as projected under this financing plan would be structured to be amortized in 30 annual installments following a 24-month capitalized interest period. Interest payments on the Bonds would be made every May 1 and November 1, and principal payments on the Bonds would be made either on May 1 or on November 1.

In order to finance the improvements and other costs, the District would need to borrow more funds and incur indebtedness in the total amount of approximately $96,765,000. The difference is comprised of debt service reserve funding, capitalized interest, underwriter's discount and the costs of issuance. Preliminary sources and uses of funding and assumptions for the Bonds are presented in Table 3 in the *Appendix*.

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

5.0 Assessment Methodology

5.1 Overview

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

5.2 Benefit Allocation

The most current development plan envisions the development 154 Townhomes, 154 Single-family 35' units, 173 Single-family 40' units, and 131 Single-family 50' units for a total of 612 residential units, to be developed over a multi-year period in one or more development phases, although unit numbers and land use types may change throughout the development period.

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

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

As stated previously, the public infrastructure improvements included in the CIP have a logical connection to the direct special and peculiar benefits received by the assessable land within the District, as without such improvements, the development of the properties within

the District would not be possible. Based upon the connection between the improvements and the direct special and peculiar benefits to the land within the District, the District can assign or allocate a portion of the District's debt through the imposition of non-ad valorem assessments, to the land receiving such direct special and peculiar benefits. Even though these direct special and peculiar benefits are real and ascertainable, the precise amount of the benefit cannot yet be calculated with mathematical certainty. However, such benefit is more valuable than the pro-rata cost of the improvements necessary for that parcel, or the actual non-ad valorem assessment amount levied on that parcel.

The benefit associated with the CIP of the District is proposed to be allocated to the different product types within the District in proportion to the density of development and intensity of use of the infrastructure as measured by a standard unit called an Equivalent Residential Unit ("ERU"). Table 4 in the *Appendix* illustrates the ERU weights that are proposed to be assigned to the unit types contemplated to be developed within the District based on the relative density of development and the intensity of use of master infrastructure, the total ERU counts for each land use category, and the share of the benefit received by each land use.

The rationale behind different ERU weights is supported by the fact that generally and on average units with smaller lot sizes will use and benefit from the District's improvements less than units with larger lot sizes, as for instance, generally and on average units with smaller lot sizes produce less storm water runoff, may produce fewer vehicular trips, and may need less water/sewer capacity than units with larger lot sizes. As the exact amount of the benefit is not possible to be calculated at this time, the use of ERU measures serves as a reasonable approximation of the relative amount of benefit received from the CIP.

Table 5 in the *Appendix* presents the apportionment of the assessment associated with funding the District's CIP (the "Bond Assessments") in accordance with the ERU benefit allocation method presented in Table 4. Table 5 also presents the annual levels of the projected annual debt service assessments per unit.

Amenities – No Bond Assessments are allocated herein to any private amenities or other common areas planned for the Development. If owned by a homeowner's association, the amenities and common areas would be considered a common element for the exclusive benefit of property owners. Accordingly, any benefit to the amenities and common areas would directly benefit

all platted lots in the District. If the common elements are owned by the District, then they would be governmental property not subject to the Bond Assessments and would be open to the general public, subject to District rules and policies. As such, no Bond Assessments will be assigned to the amenities and common areas.

Government Property – Real property owned by units of local, state, and federal governments, or similarly exempt entities, shall not be subject to the Bond Assessments without specific consent thereto. If at any time, any real property on which Bond Assessments are imposed is proposed to be sold or otherwise transferred to a unit of local, state, or federal government, or similarly exempt entity, all future unpaid Bond Assessments for such tax parcel shall become due and payable immediately prior to such transfer by way of a mandatory true-up payment without any further action of the District.

5.3 Assigning Debt

As the land in the District is not yet platted for its intended final use and the precise location of the various product types by lot or parcel is unknown, the Bond Assessments will initially be levied on all of the land in the District on an equal pro-rata gross acre basis and thus the total bonded debt in the amount of $96,765,000 will be preliminarily levied on approximately 112.332 +/- gross acres at a rate of $861,419.72 per gross acre.

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

Transferred Property - In the event unplatted land is sold to a third party (the "**Transferred Property**"), the Bond Assessments will be assigned to such Transferred Property at the time of the sale based on the maximum total number of ERUs assigned by the Developer to that Transferred Property, subject to review by the District's methodology consultant, to ensure that any such assignment is reasonable, supported by current development rights and plans, and otherwise consistent with this Report. The owner of the Transferred Property will be responsible for the total Bond Assessments applicable to the Transferred Property, regardless of the total number of ERUs ultimately actually platted. This total Bond Assessment is allocated to the Transferred Property at the time of the sale.

5.4 Lienability Test: Special and Peculiar Benefit to the Property

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

Public infrastructure improvements undertaken by the District can be shown to be creating direct special and peculiar benefits to the property within the District. The direct special and peculiar benefits resulting from each improvement include, but are not limited to:

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

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

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

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

The apportionment of the Bond Assessments is fair and reasonable because, with the exception mentioned in *Section 5.2*, it was conducted on the basis of consistent application of the methodology described in *Section 5.2* across all assessable property within the District according to reasonable estimates of the direct special and peculiar benefits derived from the CIP by land use. Accordingly, no acre or parcel of property within the District will be liened for the payment of any Bond Assessments more than the determined direct special benefit peculiar to that property.

5.6 True-Up Mechanism

The District's assessment program is predicated on the development of lots in a manner sufficient to include all of the planned ERUs as set forth in Table 1 in the *Appendix* ("Development Plan"). At such time as lands are to be platted (or re-platted) or site plans are to be approved (or re-approved), the plat or site plan (either, herein, "Proposed Plat") shall be presented to the District for a "true-up" review as follows:

a. If a Proposed Plat within the District results in the same amount of ERUs (and thus Bond Assessments) able to be imposed on the "Remaining Unplatted Developable Lands" within the District (i.e., those remaining unplatted developable lands after the Proposed Plat is recorded) as compared to what was originally contemplated under the Development Plan, then the District shall allocate the Bond Assessments to the product types being platted and the remaining property in accordance with this Report, and cause the Bond Assessments to be recorded in the District's Improvement Lien Book.

b. If a Proposed Plat results in a greater amount of ERUs (and thus Bond Assessments) such that the Remaining Unplatted Developable Lands would be assigned fewer ERUs (and Bond Assessments) than originally contemplated by the Development Plan, then the District may undertake a pro rata reduction of Bond Assessments for all assessed properties within the District, may allocate additional ERUs/densities for a future bond financing, or may otherwise address such net decrease as permitted by law.

c. If a Proposed Plat results in a lower amount of ERUs (and thus Bond Assessments) such that the Remaining Unplatted Developable Lands would have to be assigned more ERUs (and Bond Assessments) in order to fully assign all of the ERUs originally contemplated by the Development Plan, then the District shall require the landowner(s) of the lands encompassed by the Proposed Plat to pay a "True-Up Payment" equal to the difference between: (i) the Bond Assessments originally contemplated to be imposed on the lands subject to the Proposed Plat, and (ii) the Bond Assessments able to be imposed on the lands subject to the Proposed Plat, after the Proposed Plat (plus applicable interest, collection costs, penalties, etc.).

With respect to the foregoing true-up analysis, the District's Assessment Consultant, in consultation with the District Engineer, District Counsel and the District's Bond Counsel, shall determine in

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

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

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

Such review shall be limited solely to the function and the enforcement of the District's Bond Assessment liens and/or true-up agreements. Nothing herein shall in any way operate to or be construed as providing any other plat approval or disapproval powers

to the District. For further detail on the true-up process, please refer to the True-Up Agreement and applicable assessment resolution(s).

5.7 Assessment Roll

The Bond Assessments of $96,765,000 are proposed to be levied over the area described in Exhibit "A". Excluding any capitalized interest period, Bond Assessments shall be paid in thirty (30) annual principal installments.

5.8 Additional Items Regarding Bond Assessment Imposition and Allocation

Master Lien - This master assessment allocation methodology is intended to establish the necessary benefit and fair and reasonable allocation findings for a master assessment lien, which may give rise to one or more individual assessment liens relating to individual bond issuances necessary to fund all or a portion of the project(s) referenced herein comprising the CIP. All such liens shall be within the benefit limits established herein and using the allocation methodology described herein, and shall be described in one or more supplemental reports.

System of Improvements - As noted herein, the CIP functions as a system of improvements. Among other implications, this means that proceeds from any particular bond issuance can be used to fund the CIP within any benefitted property or designated assessment area within the District, regardless of where the Bond Assessments are levied, provided that Bond Assessments are fairly and reasonably allocated across all benefitted properties.

Contributions - As may be set forth in any supplemental report, and for any particular bond issuance, the Developer may opt to "buy down" the Bond Assessments on particular product types and/or lands using a contribution of cash, infrastructure or other consideration, and in order for Bond Assessments to reach certain target levels. Note that any "true-up," as described herein, shall require a payment to satisfy "true-up" obligations as well as additional contributions to maintain such target assessment levels. Any amounts contributed by the Developer to pay down Bond Assessments will not be eligible for "deferred costs" or any other form of repayment, if any are provided for in connection with any particular bond issuance.

New Unit Types - As noted herein, this Report identifies the anticipated product types for the development, and associates

particular ERU factors with each product type. If new product types are identified in the course of development, the District's Assessment Consultant – without a further hearing – may determine the ERU factor for the new product type on a front footage basis, provided that such determination is made on a pro-rated basis and derived from the front footage of existing product types and their corresponding ERUs. For example, if a Single-family 50' unit has an ERU of 1.00, and a Single-family 60' unit has an ERU of 1.20, then a new Single-family 55' unit would have an ERU of 1.10.

6.0 Additional Stipulations

6.1 Overview

Wrathell, Hunt & Associates, LLC was retained by the District to prepare a methodology to fairly allocate the Bond Assessments related to the District's CIP. Certain financing, development and engineering data was provided by members of District Staff and/or the Developer. The allocation methodology described herein was based on information provided by those professionals. Wrathell, Hunt & Associates, LLC makes no representations regarding said information transactions beyond restatement of the factual information necessary for compilation of this Report. For additional information on the Bond structure and related items, please refer to the Offering Statement associated with this transaction.

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

7.0 Appendix

Table 1

The Groves of St. Lucie County

Community Development District

Development Plan

Unit Type	Total Number of Units
Townhome	154
Single-family 35'	154
Single-family 40'	173
Single-family 50'	131
Total	**612**

Table 2

The Groves of St. Lucie County

Community Development District

Capital Improvement Plan

Improvement	Total CIP Costs
Stormwater Management	$ 14,000,000.00
Roadways	$ 7,500,000.00
Water & Wastewater Utilities	$ 10,000,000.00
Undergrounding of Conduit	$ 1,500,000.00
Hardscape/ Landscape/ Irrigation	$ 5,000,000.00
Conservation Areas	$ -
Amenity	$ 3,250,000.00
Off-site Improvements	$ 7,500,000.00
Utility Connection Fees	$ 8,250,000.00
Professional Services	$ 1,750,000.00
Contingency	$ 11,750,000.00
Total	**$ 70,500,000.00**

Table 3

The Groves of St. Lucie County

Community Development District

Preliminary Sources and Uses of Funds

Sources	
Bond Proceeds:	
Par Amount	$96,765,000.00
Total Sources	**$96,765,000.00**
Uses	
Project Fund Deposits:	
Project Fund	$70,500,000.00
Other Fund Deposits:	
Debt Service Reserve Fund	$8,595,386.59
Capitalized Interest Fund	$15,482,400.00
Delivery Date Expenses:	
Costs of Issuance	$2,185,300.00
Rounding	$1,913.41
Total Uses	**$96,765,000.00**

Financing Assumptions

Coupon Rate: 8%
Capitalized Interest Period: 24 months
Term: 30 Years
Underwriter's Discount: 2%
Cost of Issuance: $250,000

Table 4

The Groves of St. Lucie County

Community Development District

Benefit Allocation

Unit Type	Number of Units	ERU per Unit	Total ERU
Townhome	154	0.50	77.00
Single-family 35'	154	0.70	107.80
Single-family 40'	173	0.80	138.40
Single-family 50'	131	1.00	131.00
Total	**612**		**454.20**

Table 5

The Groves of St. Lucie County

Community Development District

Bond Assessment Apportionment

Unit Type	Total Number of Units	Total Cost Allocation*	Total Bond Assessment Apportionment	Bond Assessment Apportionment per Unit	Annual Bond Assessment Debt Service per Unit**
Townhome	154	$11,951,783.36	$16,404,458.39	$106,522.46	$9,462.12
Single-family 35'	154	$16,732,496.70	$22,966,241.74	$149,131.44	$13,246.96
Single-family 40'	173	$21,482,166.45	$29,485,416.12	$170,435.93	$15,139.39
Single-family 50'	131	$20,333,553.50	$27,908,883.75	$213,044.91	$18,924.23
Total	**612**	**$70,500,000.00**	**$96,765,000.00**		

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

** Includes costs of collection and any allowance for early payment discount

EXHIBIT "A"

Bond Assessments in the estimated amount of $96,750,000 are proposed to be levied uniformly over the area described below:

LEGAL DESCRIPTION

PHASE 1

BEING A PORTION OF THE PLAT OF FORT PIERCE FARMS, ACCORDING TO THE PLAT THEREOF RECORDED IN PLAT BOOK 2, PAGE 7, PUBLIC RECORDS OF ST. LUCIE COUNTY, FLORIDA, SAID PORTION BEING IN THE EAST HALF (E.1/2) OF THE NORTHWEST QUARTER (NW 1/4) OF SECTION 16, TOWNSHIP 34 SOUTH, RANGE 39 EAST, BEING THAT PART LYING NORTH OF INDRIO ROAD, AND LYING EAST OF KOBLEGARD ROAD AS RECORDED IN DEED BOOK 78, PAGE 288 AND IN OFFICIAL RECORDS BOOK 3762, PAGE 2597 OF SAID PUBLIC RECORDS, SAID PORTION BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

COMMENCING AT THE WEST QUARTER CORNER OF SAID SECTION 16; THENCE NORTH 0°32'06" EAST (STATE PLANE GRID BEARING DATUM) ALONG THE WEST LINE OF SECTION 16, A DISTANCE OF 2618.10 FEET TO A POINT ON A LINE THAT IS 45 FEET SOUTH OF AND PARALLEL WITH THE NORTH LINE OF SECTION 16; THENCE SOUTH 89°48'23" EAST ALONG A LINE THAT IS 45 FEET SOUTH OF AND PARALLEL WITH THE NORTH LINE OF SECTION 16, A DISTANCE OF 1321.24 FEET TO EAST RIGHT-OF-WAY LINE OF SAID KOBLEGARD ROAD, BEING THE **POINT OF BEGINNING** OF THE PARCEL DESCRIBED HEREIN; THENCE CONTINUE SOUTH 89°48'23" EAST ALONG A LINE THAT IS 45 FEET SOUTH OF AND PARALLEL WITH THE NORTH LINE OF SECTION 16, A DISTANCE OF 1241.23 FEET TO THE WEST RIGHT-OF-WAY LINE OF F.P.F.W.C.D CANAL NO. 1, BEING A LINE THAT IS 80.00 FEET WEST OF AND PARALLEL WITH THE EAST LINE OF THE NORTHWEST QUARTER OF SECTION 16; THENCE SOUTH 00°48'42" WEST ALONG SAID RIGHT-OF-WAY LINE, 1779.86 FEET; THENCE NORTH 89°22'00" WEST, 316.74 FEET; THENCE SOUTH 00°12'06" WEST, 290.93 FEET; THENCE NORTH 89°47'49" WEST, 138.59 FEET; THENCE NORTH 00°12'45" WEST, 264.17 FEET; THENCE SOUTH 89°54'39" WEST, 114.49 FEET; THENCE NORTH 00°15'10" EAST, 151.65 FEET; THENCE NORTH 89°56'14" WEST, 56.93 FEET; THENCE NORTH 00°04'18" EAST, 297.38 FEET; THENCE NORTH 89°43'13" WEST, 604.25 FEET TO THE EAST RIGHT-OF-WAY LINE OF SAID KOBLEGARD ROAD; THENCE NORTH 00°40'23" EAST ALONG THE EAST RIGHT-OF-WAY LINE OF KOBLEGARD ROAD, 213.09 FEET TO A POINT OF CURVATURE; THENCE NORTHERLY ALONG THE EAST RIGHT-OF-WAY LINE OF KOBLEGARD ROAD BEING AN ARC OF A CURVE CONCAVE TO THE EAST HAVING A RADIUS OF 4950.00 FEET, A CENTRAL ANGLE OF 04°47'43", AN ARC LENGTH OF 414.27 FEET TO A POINT OF REVERSE CURVATURE; THENCE NORTHERLY ALONG SAID EAST RIGHT-OF-WAY LINE BEING AN ARC OF A CURVE CONCAVE TO THE WEST HAVING A RADIUS OF 5050.00 FEET, A CENTRAL ANGLE OF 05°22'09", AN ARC LENGTH OF 473.22 FEET TO A POINT OF NON-TANGENCY; THENCE NORTH 90°00'00" WEST ALONG SAID RIGHT-OF-WAY LINE, 34.75 FEET; THENCE NORTH 00°40'23" EAST ALONG SAID EAST RIGHT-OF-WAY LINE, 255.67 FEET TO THE POINT OF BEGINNING.

ABOVE DESCRIBED PARCEL CONTAINS 45.154 ACRES, MORE OR LESS.

SHEET: 1 OF 3

JOB NUMBER: D 22-005.D

DRAWN BY: JC SCHABORT
CHECKED BY: K. WILLIAMS
DATE: 08/04/08
FIELD WORK DATE: N/A
FIELD BOOK/PAGES: N/A

BY:	DATE:	REVISIONS

SKETCH AND LEGAL DESCRIPTION
PARCEL 1 - NE NEIGHBORHOOD
PHASE 1
BEDNER FARMS

F.R.S. & ASSOCIATES, INC.
LAND SURVEYORS AND LAND PLANNERS
CERTIFICATE OF AUTHORIZATION NO. LB 4241
2257 VISTA PARKWAY, SUITE 4
WEST PALM BEACH, FLORIDA 33411
PHONE (561) 478-7178
Web Site: www.frssurvey.com

T:\Draw\Indrio - Bedner Farms\Civil 3D Drawings\Bedner - NE Neighborhood (sketch and legal SP2 and SP3)(04.26.2024).dwg May 01, 2024 - 3:39pm

TOGETHER WITH:

PARCEL 2 NORTH

BEING A PORTION OF THE PLAT OF FORT PIERCE FARMS, ACCORDING TO THE PLAT THEREOF RECORDED IN PLAT BOOK 2, PAGE 7, PUBLIC RECORDS OF ST. LUCIE COUNTY, FLORIDA, SAID PORTION BEING IN THE WEST HALF (W.1/2) OF THE NORTHWEST QUARTER (NW 1/4) OF SECTION 16, AND IN THE EAST HALF (E.1/2) OF THE NORTHEAST QUARTER (NE 1/4) OF SECTION 17, TOWNSHIP 34 SOUTH, RANGE 39 EAST, BEING THAT PART LYING NORTH OF SPANISH LAKES BOULEVARD AS RECORDED IN OFFICIAL RECORDS BOOK 3762, PAGE 2597, AND LYING WEST OF KOBLEGARD ROAD AS RECORDED IN DEED BOOK 78, PAGE 288 AND IN OFFICIAL RECORDS BOOK 3762, PAGE 2597 OF SAID PUBLIC RECORDS, SAID PORTION BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

COMMENCING AT THE EAST QUARTER CORNER OF SAID SECTION 17; THENCE NORTH 0°32'06" EAST (STATE PLANE GRID BEARING DATUM) ALONG THE EAST LINE OF SECTION 17, A DISTANCE OF 1393.69 FEET TO THE NORTH RIGHT-OF-WAY LINE OF SAID SPANISH LAKES BOULEVARD, BEING THE **POINT OF BEGINNING** OF THE PARCEL DESCRIBED HEREIN; THENCE SOUTH 82°23'18" WEST ALONG THE NORTH RIGHT-OF-WAY LINE OF SAID SPANISH LAKES BOULEVARD, 570.46 FEET TO A POINT OF CURVATURE; THENCE WESTERLY ALONG AN ARC OF A CURVE CONCAVE TO THE NORTH, HAVING A RADIUS OF 1450.00 FEET, A CENTRAL ANGLE OF 30°55'35, AN ARC DISTANCE OF 782.67 FEET TO A NON-TANGENT POINT ON THE WEST LINE OF THE EAST HALF (E. 1/2) OF THE NORTHEAST QUARTER OF SECTION 17, THROUGH WHICH A RADIAL LINE BEARS NORTH 23°18'53" EAST; THENCE NORTH 0°30'19.0" EAST ALONG SAID WEST LINE, 1191.59 FEET TO A POINT ON A LINE THAT IS 40 FEET SOUTH OF AND PARALLEL WITH THE NORTH LINE OF SECTION 17; THENCE NORTH 89°39'59" EAST ALONG SAID PARALLEL LINE, 1332.37 FEET TO THE EAST LINE OF SECTION 17; THENCE SOUTH 00°32'06" WEST ALONG THE WEST LINE OF SECTION 16, A DISTANCE OF 5.00 FEET; THENCE SOUTH 89°48'23" EAST ALONG A LINE THAT IS 45 FEET SOUTH OF AND PARALLEL WITH THE NORTH LINE OF SECTION 16, A DISTANCE OF 1291.24 FEET TO WEST RIGHT-OF-WAY LINE OF SAID KOBLEGARD ROAD; THENCE SOUTH 00°40'23" WEST ALONG SAID WEST LINE, 255.77 FEET; THENCE SOUTH 90°00'00" WEST ALONG SAID RIGHT-OF-WAY LINE, 35.25 FEET TO A NON-TANGENT POINT OF CURVATURE THROUGH WHICH A LINE, RADIAL TO THE SUBSEQUENT CURVE, BEARS NORTH 89°53'55" WEST; THENCE SOUTHERLY ALONG THE WEST RIGHT-OF-WAY LINE OF KOBLEGARD ROAD BEING AN ARC OF A CURVE CONCAVE TO THE WEST HAVING A RADIUS OF 4950.00 FEET, A CENTRAL ANGLE OF 02°57'46", AN ARC LENGTH OF 255.97 FEET; THENCE NORTH 89°51'26" WEST ALONG THE NORTH LINE OF PARCEL 101 AS DESCRIBED IN SAID OFFICIAL RECORD BOOK 3762, PAGE 2597, A DISTANCE OF 397.71 FEET; THENCE SOUTH 00°40'23" WEST ALONG THE WEST LINE OF SAID PARCEL 101, A DISTANCE OF 666.03 FEET TO THE NORTH RIGHT-OF-WAY LINE OF SAID SPANISH LAKES BOULEVARD; THENCE NORTH 89°51'26" WEST ALONG SAID RIGHT-OF-WAY LINE, 310.57 FEET TO A POINT OF CURVATURE; THENCE WESTERLY ALONG AN ARC OF A CURVE CONCAVE TO THE SOUTH HAVING A RADIUS OF 3050.00 FEET, A CENTRAL ANGLE OF 07°45'16", AN ARC LENGTH OF 412.79 FEET TO A POINT OF TANGENCY; THENCE SOUTH 82°23'18" WEST ALONG THE NORTH RIGHT-OF-WAY LINE OF SAID SPANISH LAKES BOULEVARD, 130.79 FEET TO THE POINT OF BEGINNING.

ABOVE DESCRIBED PARCEL CONTAINS 67.178 ACRES, MORE OR LESS.

AND FURTHER DESCRIBED IN THE FOLLOWING PAGES:

Exhibit "B"

The debt assessment lien is being placed on property described in the attached legal description. For notice purposes, listed below are the potentially applicable County Property Appraiser parcels, and property owners, developers/potential property owners, and developers that will be included on a mailing list related to debt assessments:

Parcel ID	Owner	Address	City | State | Zip
1317-111-0003-000-8	S7 Grove, LLC	11509 Highland Farm Road	Potomac, MD 20854
1316-221-0002-000-6	S7 Grove, LLC	11509 Highland Farm Road	Potomac, MD 20854
1316-211-0001-000-8	S7 Grove, LLC	11509 Highland Farm Road	Potomac, MD 20854

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

4C

The Groves of St. Lucie County
Community Development District

Engineer's Report
of Infrastructure Improvements
Dated: February ___, 2026

Prepared For:

The Groves of St. Lucie County
Community Development District
Board of Supervisors
St. Lucie County, Florida

Prepared By:

Kimley»Horn

445 24th Steet, Suite 200
Vero Beach, FL 32960
Main: 772-794-4100
Direct: 772-794-4117
Email: alex.daugherty@kimley-horn.com

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SECTION I

INTRODUCTION AND PROJECT DESCRIPTION

The Groves of St. Lucie County Community Development District ("CDD" or "District") was created for the purpose of financing and managing the construction and maintenance of public infrastructure for the Grove Residential Development, a ± 112.332-acre [TAKEN FROM ORDINANCE LEGAL] residential development located generally north of Indrio Road and east of I-95 in St. Lucie County Florida. For permitting purposes, the overall proposed subdivision was divided into two different sites ("The Grove NW" and "The Grove NE"), but they are both part of the overall community. The Grove NW site is situated northwest of the intersection of Spanish Lakes Boulevard and Koblegard Road, while The Grove NE site is situated northeast of the intersection.

The overall development will consist of the construction of 612 total units (154 35-foot single family lots, 173 40-foot single family lots, 131 50-foot single family lots, and 154 townhome units) as summarized in the table below:

PRODUCT TYPES

Product Type	District Totals
35' Single-Family Lot	154
40' Single-Family Lot	173
50' Single-Family Lot	131
Townhome Units	154
TOTAL UNITS:	612

The public infrastructure necessary to develop the CDD includes the following:

- A stormwater management system that consists of a network of lakes and interconnected storm inlets and pipes
- Roadway improvements including irrigation and landscaping
- A water distribution system
- A sanitary sewer collection and transmission system including two lift stations (one for "The Grove NW" and one for "The Grove NE")
- Offsite roadway improvements consisting of proposed utilities, a roundabout, and street lighting
- Environmental improvements
- Recreational Tract Improvements

These infrastructure improvements will provide service to the CDD. The estimated cost of these public improvements is $70,500,000 as further detailed in this Engineer's Report (sometimes collectively referred to as the "Project" or the "CIP"). This cost identifies the current intentions of the District and is subject to change based upon various factors such as development plans, permitting and market conditions. Kimley-Horn and Associates, Inc. has no control over the cost of labor, materials, equipment, or services furnished by others, or over methods of determining price, or over competitive bidding or market conditions. Any and all professional opinions as to costs reflected herein, including but not limited to professional opinions as to the costs of construction materials, are made on the basis of professional experience and available data. Kimley-Horn and Associates, Inc. cannot and does not guarantee or warrant that actual costs will not vary from the professional opinions of costs shown herein.

SECTION II

PURPOSE AND SCOPE

The purpose of this Engineer's Report is to outline the infrastructure improvements and associated costs of the Project. The District Engineer has considered, and, in certain instances, relied upon opinions, information, and documentation prepared or supplied by others, which may have included the developer, contractors, surveyors, legal counsel, and the District's Board of Supervisors, staff, and consultants.

SECTION III

DESCRIPTION OF IMPROVEMENTS

Stormwater Management System

The surface water management system will consist of inlets, manholes and storm pipes that direct runoff to the on-site lake system for stormwater treatment and attenuation. This system also includes pumps for stormwater harvesting as well as control structure that discharges to the Fort Pierce Farms Water Control District (FPFWCD) maintained canals. The FPFWCD shall be responsible for the maintenance of the outfall pipe and lake bank along Canals 1 and 13 for both sites. The stormwater system will be designed consistently with the applicable design requirements for stormwater/floodplain management systems per South Florida Water Management District (SFWMD) and FPFWCD requirements. The stormwater management system will be situated within tracts or easements that will be granted to the CDD. The District will finance, own and maintain the stormwater system.

Lake Excavation

The lake excavation for the Project will consist of the contractor's mobilization, supervision, clearing and grubbing, demolition, dewatering, lake excavation to a minimum of 12 feet and a maximum of 60 feet below design water level (consistent with the approved Environmental Resource Permits) and stockpiling the material adjacent to the lake for construction of the infrastructure. These activities also include storm water pollution prevention measures. The excavated material will be used onsite as fill to help balance the earthwork.

NOTE: The District will finance costs of importing fill solely related to the stormwater management systems. Any costs of importing any fill for use to develop private lots will not be financed by CDD tax-exempt debt.

Onsite Roadway Improvements

The CIP includes subdivision roads within the District. Generally, all roads will be 2-lane un-divided roads. Such roads include the roadway asphalt, base, and subgrade, roadway curb and gutter, striping and signage and sidewalks within rights-of-way abutting non-lot lands. Sidewalks abutting lots will be constructed by the homebuilders. All roads will be designed in accordance with applicable St. Lucie County and Florida Department of Transportation (FDOT) design requirements.

All internal roadways may be financed by the District. Collector roads are intended to be dedicated to a local general purpose unit of government for ownership, operation, and maintenance, while the District anticipates owning and operating all other roads.

Offsite Roadway Improvements

The offsite roadway improvements involve extending the existing four-lane Koblegard Road north to the intersection with Spanish Lakes Boulevard, where a roundabout will be constructed to improve traffic circulation. Additionally, the current two-lane portion of Koblegard Road will be further extended north to the FPFWCD canal #13. These improvements also include the installation of a forcemain and watermain along Spanish Lakes Boulevard and Koblegard Road as well as associated drainage infrastructure.

Wet Utilities (Water and Wastewater)

As part of the CIP, the District intends to construct and/or acquire from the Developer water and wastewater infrastructure for conveyance to the County for final ownership and operation. In particular, the on-site water distribution system will consist of 8" diameter C-900 PVC mains, fire hydrants, and water services to all the lots for potable service and fire protection. The onsite water distribution system will be located within rights-of-way and utility easements.

The wastewater conveyance system will feature an 8-inch PVC gravity sewer that directs wastewater to lift stations located on both sites. At each lift station, sewage is pumped through a 6-inch HDPE force main—from the onsite wet wells—to a designated connection point: Spanish Lakes Boulevard for The Grove NW and Koblegard Road for The Grove NE. The offsite force main along Spanish Lakes Boulevard will link with the force main along Koblegard Road, which then connects to the existing 12-inch force main at the northeast corner of Indrio Road and Koblegard Road.

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

Hardscape, Landscape, and Irrigation

The District will construct and/or install landscaping, irrigation and hardscaping within District common areas and rights-of-way. The District is required to adhere to local standards for planting and irrigation design. In practice, the landscaping and irrigation on these sites will comply with these regulations for the benefit of the community.

The District will own, maintain, and fund all landscaping, irrigation, hardscaping, and stormwater harvesting systems (pumps and supplemental wet wells for lake recharge), as permitted by SFWMD. Such infrastructure, to the extent that it is located in rights-of-way owned by a local general-purpose government, will be maintained pursuant to a right-of-way agreement or permit.

Dry Utilities (Streetlights and Electrical)

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

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

Environmental Considerations

No onsite conservation areas or payments to private wetland mitigation banks are required to offset wetland and surface water impacts associated with the construction of the development. The listed species surveys dated July 22, 2025 by Atlantic Environmental found no evidence of gopher tortoise or crested caracaras habitat within the project site. No wading bird species were identified using the project site, with the exception of Wood Storks. Stormwater lakes were designed with lake littoral to provide foraging habitat for Wood Storks, the lake littoral acreage provides no net loss of existing foraging habitat. The District will be responsible for the design, permitting, construction, maintenance, and government reporting of the environmental mitigation. These costs are included within the CIP.

Recreational Amenities

As part of the overall development, the District may elect to construct and/or acquire a clubhouse and other amenity facilities. Any District funded clubhouse or other amenity facilities will be open to the public and will be owned, operated and maintained by the District. Alternatively, the Developer may privately fund such facilities and, upon completion, transfer them to a homeowners' association for ownership, operation and maintenance. In such events, the amenities would be considered common elements for the exclusive benefit of the District landowners.

Professional Services

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

NOTE: In the event that impact fee credits are generated from any roadway, utilities or other improvements funded by the District, or the District funds any utility connection fees, any such resulting credits, will be the subject of an acquisition agreement between the applicable developer and the District whereby the District will either receive the credits or the equivalent value of the credits at no cost to the District.

SECTION IV

PERMITTING STATUS

All necessary permits for the construction of the CIP have either been obtained or are expected to be obtained. Please see summary of permits below:

The Grove NW:

- United States Army Corps of Engineers – Received
- South Florida Water Management District ERP Individual Permit – Received
- South Florida Water Management District CUP (Irrigation/Dewatering) – Received
- St Lucie County Site Development Permit – In Review
- St Lucie County Vegetation Removal Permit – In Review
- St Lucie County Fire – Received
- Fort Pierce Farms Water Control District Drainage Permit – Received
- Florida Department of Environmental Protection Water and Sewer – Pending Initial Submittal
- St Lucie County Preliminary Plat – In Review
- St Lucie County Final Plat – Pending Initial Submittal

The Grove NE:

- United States Army Corps of Engineers – Received
- South Florida Water Management District ERP Individual Permit – Received
- South Florida Water Management District CUP (Irrigation/Dewatering) – Received
- St Lucie County Site Development Permit – In Review
- St Lucie County Vegetation Removal Permit – In Review
- St Lucie County Fire – Received
- Fort Pierce Farms Water Control District Drainage Permit – Received
- Florida Department of Environmental Protection Water and Sewer – Pending Initial Submittal
- St Lucie County Preliminary Plat – In Review
- St Lucie County Final Plat – Pending Initial Submittal

Amenity Center (The Grove NE):

- South Florida Water Management District ERP Individual Permit – Received
- St Lucie County Site Development Permit – In Review
- St Lucie County Vegetation Removal Permit – In Review
- St Lucie County Fire – Approved

Offsite Improvements:

- Florida Department of Transportation Drainage Permit – In Review
- St Lucie County Right-of-Way Permit for Roundabout / Road Extension – In Review
- St Lucie County Offsite Utility Permit – In Review
- South Florida Water Management District ERP Individual Permit – In Review

SECTION V

CIP COST ESTIMATES / MAINTENANCE RESPONSIBILITIES

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

CIP COST ESTIMATE

Improvement	Cost Estimate	Ownership and Maintenance Entity
Stormwater Management	$14,000,000	CDD
Roadways	$7,500,000	County
Water & Wastewater Utilities	$10,000,000	County
Undergrounding of Conduit	$1,500,000	CDD
Hardscape/Landscape/Irrigation	$5,000,000	CDD
Conservation Areas	-	CDD
Amenity	$3,250,000	CDD
Off-Site Improvements	$7,500,000	County
Professional Services	$1,750,000	CDD
Utility Connection Fees	$8,250,000	CDD
Contingency	$11,750,000	As above
TOTAL	**$70,500,000**	

a. The probable costs estimated herein do not include anticipated carrying cost, interest reserves or other anticipated CDD expenditures that may be incurred.
b. The developer reserves the right to finance any of the improvements outlined above, and have such improvements owned and maintained by a property owner's or

homeowner's association, in which case such items would not be part of the CIP.

c. The District may enter into an agreement with a third-party, or an applicable property owner's or homeowner's association, to maintain any District-owned improvements, subject to the approval of the District's bond counsel.
d. Impact fee or utility credits may be available from master roadway and utility improvements or other payments. The developer and the District will enter into an acquisition agreement whereby the developer may elect to keep any such credits, provided that consideration is provided to the District in the form of improvements, land, a prepayment of debt assessments, or other consideration.

SECTION VI

CONCLUSIONS

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

It is further our opinion that:

- The estimated cost of the CIP as set forth herein is reasonable based on prices currently being experienced in the jurisdiction in which the District is located, and is not greater than the lesser of the actual cost of construction or the fair market value of such infrastructure;

- All of the improvements comprising the CIP are required by applicable development approvals issued pursuant to Section 380.06, Florida Statutes;

- The CIP is feasible to construct, there are no technical reasons existing at this time that would prevent the implementation of the CIP, and it is reasonable to assume that all necessary regulatory approvals will be obtained in due course; and

- The assessable property within the District will receive a special benefit from the CIP that is at least equal to such costs.

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

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

Please note that the CIP as presented herein is based on current plans and market conditions which are subject to change. Accordingly, the CIP, as used herein, refers to sufficient public infrastructure of the kinds described herein (i.e., stormwater/floodplain management, sanitary sewer, potable water, etc.) to support the development and sale of the planned residential units in the District, which (subject to true-

up determinations) number and type of units may be changed with the development of the site. Stated differently, during development and implementation of the public infrastructure improvements as described for the District, it may be necessary to make modifications and/or deviations for the plans, and the District expressly reserves the right to do so.

SECTION VII

ENGINEER'S CERTIFICATION

It is our opinion that the extent of proposed improvements and their estimated costs are fair and reasonable and provide a direct and special benefit to the properties located within the District. We believe that those improvements not yet completed can be permitted, constructed, and installed at the estimated costs described in the report.

I hereby certify that the foregoing instrument is a true and correct copy of the Engineer's Report of The Groves of St. Lucie County Community Development District.

Sincerely,

Alex Daugherty, P.E.

KIMLEY-HORN AND ASSOCIATES, INC.

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

4D

THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT

Master Special Assessment
Methodology Report

February 20, 2026

Provided by:

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

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1.0 Introduction

1.1 Purpose

This Master Special Assessment Methodology Report (the "Report") was prepared to provide a master financing plan and a master special assessment methodology for The Groves of St. Lucie County Community Development District (the “District”), located entirely within St. Lucie County, Florida (the “County”), as related to funding the costs of public infrastructure improvements (the “Capital Improvement Plan” or “CIP”) contemplated to be provided by the District.

1.2 Scope of the Report

This Report presents the projections for financing the District's CIP described in The Groves of St. Lucie County Community Development District Bond Validation Engineer’s Report of Infrastructure Improvements prepared by Kimley-Horn and Associates, Inc. (the “District Engineer”) and dated February 2026, as may be amended and supplemented from time to time (the “Engineer's Report”), as well as describes the method for the allocation of special benefits and the apportionment of special assessment debt resulting from the provision and funding of the CIP.

1.3 Special Benefits and General Benefits

The improvements undertaken and funded by the District as part of the CIP create direct special and peculiar benefits to the assessable lands within its borders, different in kind and degree than general benefits for properties outside of its borders as well as general benefits to the public at large. However, as discussed within this Report, these general benefits are incidental in nature and are readily distinguishable from the direct special and peculiar benefits which accrue to the assessable property within the District. The District’s CIP enables properties within its boundaries to be developed.

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

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

1.4 Organization of the Report

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

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

Section Four discusses the financing program for the District.

Section Five introduces the special assessment methodology for the District.

2.0 Development Program

2.1 Overview

The District serves the Groves of St. Lucie County development (the "Development" or "The Groves of St. Lucie County"), a master planned residential development located entirely within St. Lucie County, Florida. The land within the District consists of approximately 112.332 +/- acres and is generally located north of Indrio Road and east of I-95.

2.2 The Development Program

The development of The Groves of St. Lucie County is anticipated to be conducted by S7 Grove, LLC or an affiliated entity (the "Developer"). Based upon the information provided by the Developer and the District Engineer, the current development plan envisions 154 Townhomes, 154 Single-family 35' units, 173 Single-family 40' units, and 131 Single-family 50' units for a total of 612 residential units to be developed over a multi-year period in one or more development phases, although unit numbers, land use types, and phasing may change throughout the development period. Table 1 in

the *Appendix* illustrates the current development plan for The Groves of St. Lucie County.

3.0 The Capital Improvement Plan

3.1 Overview

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

3.2 Capital Improvement Plan

The CIP needed to serve the Development is projected to consist of master improvements which will serve all of the lands in the District. The District, however, reserves the right to create distinct assessment areas to coincide with the phases of development. The CIP will consist of stormwater management, roadways, water & wastewater utilities, undergrounding of conduit, hardscape/ landscape/ irrigation, conservation areas, amenity, off-site improvements, and utility connection fees, along with professional services and contingency, which cumulatively are estimated by the District Engineer at $70,500,000.

The public infrastructure improvements that comprise the CIP will serve and provide a direct benefit to all land uses in the District and will comprise an interrelated system of improvements, which means all of improvements will serve the entire District and improvements will be interrelated such that they will reinforce one another.

Table 2 in the *Appendix* illustrates the specific components of the CIP**.**

4.0 Financing Program

4.1 Overview

As noted above, the District is embarking on a program of public capital improvements which will facilitate the development of lands within the District. Generally, construction of public improvements is either funded by the Developer and then acquired by the District or funded directly by the District. The choice of the exact mechanism

for providing the public infrastructure has not yet been made at the time of this writing, and the District may either acquire the public infrastructure from the Developer or construct it, or partly acquire it and partly construct it.

Even though the actual financing plan may change to include multiple series of bonds, it is likely that in order to fully fund costs of the CIP as described in *Section 3.2* in one financing transaction, the District would have to issue approximately $96,765,000 in par amount of special assessment bonds (the "Bonds").

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

4.2 Types of Bonds Proposed

The proposed financing plan for the District provides for the issuance of the Bonds in the approximate principal amount of $96,765,000 to, among other things, finance approximately $70,500,000 in CIP costs. The Bonds as projected under this financing plan would be structured to be amortized in 30 annual installments following a 24-month capitalized interest period. Interest payments on the Bonds would be made every May 1 and November 1, and principal payments on the Bonds would be made either on May 1 or on November 1.

In order to finance the improvements and other costs, the District would need to borrow more funds and incur indebtedness in the total amount of approximately $96,765,000. The difference is comprised of debt service reserve funding, capitalized interest, underwriter's discount and the costs of issuance. Preliminary sources and uses of funding and assumptions for the Bonds are presented in Table 3 in the *Appendix*.

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

5.0 Assessment Methodology

5.1 Overview

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

5.2 Benefit Allocation

The most current development plan envisions the development 154 Townhomes, 154 Single-family 35' units, 173 Single-family 40' units, and 131 Single-family 50' units for a total of 612 residential units, to be developed over a multi-year period in one or more development phases, although unit numbers and land use types may change throughout the development period.

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

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

As stated previously, the public infrastructure improvements included in the CIP have a logical connection to the direct special and peculiar benefits received by the assessable land within the District, as without such improvements, the development of the properties within

the District would not be possible. Based upon the connection between the improvements and the direct special and peculiar benefits to the land within the District, the District can assign or allocate a portion of the District's debt through the imposition of non-ad valorem assessments, to the land receiving such direct special and peculiar benefits. Even though these direct special and peculiar benefits are real and ascertainable, the precise amount of the benefit cannot yet be calculated with mathematical certainty. However, such benefit is more valuable than the pro-rata cost of the improvements necessary for that parcel, or the actual non-ad valorem assessment amount levied on that parcel.

The benefit associated with the CIP of the District is proposed to be allocated to the different product types within the District in proportion to the density of development and intensity of use of the infrastructure as measured by a standard unit called an Equivalent Residential Unit ("ERU"). Table 4 in the *Appendix* illustrates the ERU weights that are proposed to be assigned to the unit types contemplated to be developed within the District based on the relative density of development and the intensity of use of master infrastructure, the total ERU counts for each land use category, and the share of the benefit received by each land use.

The rationale behind different ERU weights is supported by the fact that generally and on average units with smaller lot sizes will use and benefit from the District's improvements less than units with larger lot sizes, as for instance, generally and on average units with smaller lot sizes produce less storm water runoff, may produce fewer vehicular trips, and may need less water/sewer capacity than units with larger lot sizes. As the exact amount of the benefit is not possible to be calculated at this time, the use of ERU measures serves as a reasonable approximation of the relative amount of benefit received from the CIP.

Table 5 in the *Appendix* presents the apportionment of the assessment associated with funding the District's CIP (the "Bond Assessments") in accordance with the ERU benefit allocation method presented in Table 4. Table 5 also presents the annual levels of the projected annual debt service assessments per unit.

Amenities – No Bond Assessments are allocated herein to any private amenities or other common areas planned for the Development. If owned by a homeowner's association, the amenities and common areas would be considered a common element for the exclusive benefit of property owners. Accordingly, any benefit to the amenities and common areas would directly benefit

all platted lots in the District. If the common elements are owned by the District, then they would be governmental property not subject to the Bond Assessments and would be open to the general public, subject to District rules and policies. As such, no Bond Assessments will be assigned to the amenities and common areas.

Government Property – Real property owned by units of local, state, and federal governments, or similarly exempt entities, shall not be subject to the Bond Assessments without specific consent thereto. If at any time, any real property on which Bond Assessments are imposed is proposed to be sold or otherwise transferred to a unit of local, state, or federal government, or similarly exempt entity, all future unpaid Bond Assessments for such tax parcel shall become due and payable immediately prior to such transfer by way of a mandatory true-up payment without any further action of the District.

5.3 Assigning Debt

As the land in the District is not yet platted for its intended final use and the precise location of the various product types by lot or parcel is unknown, the Bond Assessments will initially be levied on all of the land in the District on an equal pro-rata gross acre basis and thus the total bonded debt in the amount of $96,765,000 will be preliminarily levied on approximately 112.332 +/- gross acres at a rate of $861,419.72 per gross acre.

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

Transferred Property - In the event unplatted land is sold to a third party (the "**Transferred Property**"), the Bond Assessments will be assigned to such Transferred Property at the time of the sale based on the maximum total number of ERUs assigned by the Developer to that Transferred Property, subject to review by the District's methodology consultant, to ensure that any such assignment is reasonable, supported by current development rights and plans, and otherwise consistent with this Report. The owner of the Transferred Property will be responsible for the total Bond Assessments applicable to the Transferred Property, regardless of the total number of ERUs ultimately actually platted. This total Bond Assessment is allocated to the Transferred Property at the time of the sale.

5.4 Lienability Test: Special and Peculiar Benefit to the Property

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

Public infrastructure improvements undertaken by the District can be shown to be creating direct special and peculiar benefits to the property within the District. The direct special and peculiar benefits resulting from each improvement include, but are not limited to:

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

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

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

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

The apportionment of the Bond Assessments is fair and reasonable because, with the exception mentioned in *Section 5.2*, it was conducted on the basis of consistent application of the methodology described in *Section 5.2* across all assessable property within the District according to reasonable estimates of the direct special and peculiar benefits derived from the CIP by land use. Accordingly, no acre or parcel of property within the District will be liened for the payment of any Bond Assessments more than the determined direct special benefit peculiar to that property.

5.6 True-Up Mechanism

The District's assessment program is predicated on the development of lots in a manner sufficient to include all of the planned ERUs as set forth in Table 1 in the *Appendix* ("Development Plan"). At such time as lands are to be platted (or re-platted) or site plans are to be approved (or re-approved), the plat or site plan (either, herein, "Proposed Plat") shall be presented to the District for a "true-up" review as follows:

a. If a Proposed Plat within the District results in the same amount of ERUs (and thus Bond Assessments) able to be imposed on the "Remaining Unplatted Developable Lands" within the District (i.e., those remaining unplatted developable lands after the Proposed Plat is recorded) as compared to what was originally contemplated under the Development Plan, then the District shall allocate the Bond Assessments to the product types being platted and the remaining property in accordance with this Report, and cause the Bond Assessments to be recorded in the District's Improvement Lien Book.

b. If a Proposed Plat results in a greater amount of ERUs (and thus Bond Assessments) such that the Remaining Unplatted Developable Lands would be assigned fewer ERUs (and Bond Assessments) than originally contemplated by the Development Plan, then the District may undertake a pro rata reduction of Bond Assessments for all assessed properties within the District, may allocate additional ERUs/densities for a future bond financing, or may otherwise address such net decrease as permitted by law.

c. If a Proposed Plat results in a lower amount of ERUs (and thus Bond Assessments) such that the Remaining Unplatted Developable Lands would have to be assigned more ERUs (and Bond Assessments) in order to fully assign all of the ERUs originally contemplated by the Development Plan, then the District shall require the landowner(s) of the lands encompassed by the Proposed Plat to pay a "True-Up Payment" equal to the difference between: (i) the Bond Assessments originally contemplated to be imposed on the lands subject to the Proposed Plat, and (ii) the Bond Assessments able to be imposed on the lands subject to the Proposed Plat, after the Proposed Plat (plus applicable interest, collection costs, penalties, etc.).

With respect to the foregoing true-up analysis, the District's Assessment Consultant, in consultation with the District Engineer, District Counsel and the District's Bond Counsel, shall determine in

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

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

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

Such review shall be limited solely to the function and the enforcement of the District's Bond Assessment liens and/or true-up agreements. Nothing herein shall in any way operate to or be construed as providing any other plat approval or disapproval powers

to the District. For further detail on the true-up process, please refer to the True-Up Agreement and applicable assessment resolution(s).

5.7 Assessment Roll

The Bond Assessments of $96,765,000 are proposed to be levied over the area described in Exhibit "A". Excluding any capitalized interest period, Bond Assessments shall be paid in thirty (30) annual principal installments.

5.8 Additional Items Regarding Bond Assessment Imposition and Allocation

Master Lien - This master assessment allocation methodology is intended to establish the necessary benefit and fair and reasonable allocation findings for a master assessment lien, which may give rise to one or more individual assessment liens relating to individual bond issuances necessary to fund all or a portion of the project(s) referenced herein comprising the CIP. All such liens shall be within the benefit limits established herein and using the allocation methodology described herein, and shall be described in one or more supplemental reports.

System of Improvements - As noted herein, the CIP functions as a system of improvements. Among other implications, this means that proceeds from any particular bond issuance can be used to fund the CIP within any benefitted property or designated assessment area within the District, regardless of where the Bond Assessments are levied, provided that Bond Assessments are fairly and reasonably allocated across all benefitted properties.

Contributions - As may be set forth in any supplemental report, and for any particular bond issuance, the Developer may opt to "buy down" the Bond Assessments on particular product types and/or lands using a contribution of cash, infrastructure or other consideration, and in order for Bond Assessments to reach certain target levels. Note that any "true-up," as described herein, shall require a payment to satisfy "true-up" obligations as well as additional contributions to maintain such target assessment levels. Any amounts contributed by the Developer to pay down Bond Assessments will not be eligible for "deferred costs" or any other form of repayment, if any are provided for in connection with any particular bond issuance.

New Unit Types - As noted herein, this Report identifies the anticipated product types for the development, and associates

particular ERU factors with each product type. If new product types are identified in the course of development, the District's Assessment Consultant – without a further hearing – may determine the ERU factor for the new product type on a front footage basis, provided that such determination is made on a pro-rated basis and derived from the front footage of existing product types and their corresponding ERUs. For example, if a Single-family 50' unit has an ERU of 1.00, and a Single-family 60' unit has an ERU of 1.20, then a new Single-family 55' unit would have an ERU of 1.10.

6.0 Additional Stipulations

6.1 Overview

Wrathell, Hunt & Associates, LLC was retained by the District to prepare a methodology to fairly allocate the Bond Assessments related to the District's CIP. Certain financing, development and engineering data was provided by members of District Staff and/or the Developer. The allocation methodology described herein was based on information provided by those professionals. Wrathell, Hunt & Associates, LLC makes no representations regarding said information transactions beyond restatement of the factual information necessary for compilation of this Report. For additional information on the Bond structure and related items, please refer to the Offering Statement associated with this transaction.

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

7.0 Appendix

Table 1

The Groves of St. Lucie County

Community Development District

Development Plan

Unit Type	Total Number of Units
Townhome	154
Single-family 35'	154
Single-family 40'	173
Single-family 50'	131
Total	**612**

Table 2

The Groves of St. Lucie County

Community Development District

Capital Improvement Plan

Improvement	Total CIP Costs
Stormwater Management	$ 14,000,000.00
Roadways	$ 7,500,000.00
Water & Wastewater Utilities	$ 10,000,000.00
Undergrounding of Conduit	$ 1,500,000.00
Hardscape/ Landscape/ Irrigation	$ 5,000,000.00
Conservation Areas	$ -
Amenity	$ 3,250,000.00
Off-site Improvements	$ 7,500,000.00
Utility Connection Fees	$ 8,250,000.00
Professional Services	$ 1,750,000.00
Contingency	$ 11,750,000.00
Total	**$ 70,500,000.00**

Table 3

The Groves of St. Lucie County

Community Development District

Preliminary Sources and Uses of Funds

Sources	
Bond Proceeds:	
Par Amount	$96,765,000.00
Total Sources	**$96,765,000.00**
Uses	
Project Fund Deposits:	
Project Fund	$70,500,000.00
Other Fund Deposits:	
Debt Service Reserve Fund	$8,595,386.59
Capitalized Interest Fund	$15,482,400.00
Delivery Date Expenses:	
Costs of Issuance	$2,185,300.00
Rounding	$1,913.41
Total Uses	**$96,765,000.00**

Financing Assumptions

Coupon Rate: 8%
Capitalized Interest Period: 24 months
Term: 30 Years
Underwriter's Discount: 2%
Cost of Issuance: $250,000

Table 4

The Groves of St. Lucie County

Community Development District

Benefit Allocation

Unit Type	Number of Units	ERU per Unit	Total ERU
Townhome	154	0.50	77.00
Single-family 35'	154	0.70	107.80
Single-family 40'	173	0.80	138.40
Single-family 50'	131	1.00	131.00
Total	**612**		**454.20**

Table 5

The Groves of St. Lucie County

Community Development District

Bond Assessment Apportionment

Unit Type	Total Number of Units	Total Cost Allocation*	Total Bond Assessment Apportionment	Bond Assessment Apportionment per Unit	Annual Bond Assessment Debt Service per Unit**
Townhome	154	$11,951,783.36	$16,404,458.39	$106,522.46	$9,462.12
Single-family 35'	154	$16,732,496.70	$22,966,241.74	$149,131.44	$13,246.96
Single-family 40'	173	$21,482,166.45	$29,485,416.12	$170,435.93	$15,139.39
Single-family 50'	131	$20,333,553.50	$27,908,883.75	$213,044.91	$18,924.23
Total	**612**	**$70,500,000.00**	**$96,765,000.00**		

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

** Includes costs of collection and any allowance for early payment discount

EXHIBIT "A"

Bond Assessments in the estimated amount of $96,750,000 are proposed to be levied uniformly over the area described below:

LEGAL DESCRIPTION

PHASE 1

BEING A PORTION OF THE PLAT OF FORT PIERCE FARMS, ACCORDING TO THE PLAT THEREOF RECORDED IN PLAT BOOK 2, PAGE 7, PUBLIC RECORDS OF ST. LUCIE COUNTY, FLORIDA, SAID PORTION BEING IN THE EAST HALF (E.1/2) OF THE NORTHWEST QUARTER (NW 1/4) OF SECTION 16, TOWNSHIP 34 SOUTH, RANGE 39 EAST, BEING THAT PART LYING NORTH OF INDRIO ROAD, AND LYING EAST OF KOBLEGARD ROAD AS RECORDED IN DEED BOOK 78, PAGE 288 AND IN OFFICIAL RECORDS BOOK 3762, PAGE 2597 OF SAID PUBLIC RECORDS, SAID PORTION BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

COMMENCING AT THE WEST QUARTER CORNER OF SAID SECTION 16; THENCE NORTH 0°32'06" EAST (STATE PLANE GRID BEARING DATUM) ALONG THE WEST LINE OF SECTION 16, A DISTANCE OF 2618.10 FEET TO A POINT ON A LINE THAT IS 45 FEET SOUTH OF AND PARALLEL WITH THE NORTH LINE OF SECTION 16; THENCE SOUTH 89°48'23" EAST ALONG A LINE THAT IS 45 FEET SOUTH OF AND PARALLEL WITH THE NORTH LINE OF SECTION 16, A DISTANCE OF 1321.24 FEET TO EAST RIGHT-OF-WAY LINE OF SAID KOBLEGARD ROAD, BEING THE **POINT OF BEGINNING** OF THE PARCEL DESCRIBED HEREIN; THENCE CONTINUE SOUTH 89°48'23" EAST ALONG A LINE THAT IS 45 FEET SOUTH OF AND PARALLEL WITH THE NORTH LINE OF SECTION 16, A DISTANCE OF 1241.23 FEET TO THE WEST RIGHT-OF-WAY LINE OF F.P.F.W.C.D CANAL NO. 1, BEING A LINE THAT IS 80.00 FEET WEST OF AND PARALLEL WITH THE EAST LINE OF THE NORTHWEST QUARTER OF SECTION 16; THENCE SOUTH 00°48'42" WEST ALONG SAID RIGHT-OF-WAY LINE, 1779.86 FEET; THENCE NORTH 89°22'00" WEST, 316.74 FEET; THENCE SOUTH 00°12'06" WEST, 290.93 FEET; THENCE NORTH 89°47'49" WEST, 138.59 FEET; THENCE NORTH 00°12'45" WEST, 264.17 FEET; THENCE SOUTH 89°54'39" WEST, 114.49 FEET; THENCE NORTH 00°15'10" EAST, 151.65 FEET; THENCE NORTH 89°56'14" WEST, 56.93 FEET; THENCE NORTH 00°04'18" EAST, 297.38 FEET; THENCE NORTH 89°43'13" WEST, 604.25 FEET TO THE EAST RIGHT-OF-WAY LINE OF SAID KOBLEGARD ROAD; THENCE NORTH 00°40'23" EAST ALONG THE EAST RIGHT-OF-WAY LINE OF KOBLEGARD ROAD, 213.09 FEET TO A POINT OF CURVATURE; THENCE NORTHERLY ALONG THE EAST RIGHT-OF-WAY LINE OF KOBLEGARD ROAD BEING AN ARC OF A CURVE CONCAVE TO THE EAST HAVING A RADIUS OF 4950.00 FEET, A CENTRAL ANGLE OF 04°47'43", AN ARC LENGTH OF 414.27 FEET TO A POINT OF REVERSE CURVATURE; THENCE NORTHERLY ALONG SAID EAST RIGHT-OF-WAY LINE BEING AN ARC OF A CURVE CONCAVE TO THE WEST HAVING A RADIUS OF 5050.00 FEET, A CENTRAL ANGLE OF 05°22'09", AN ARC LENGTH OF 473.22 FEET TO A POINT OF NON-TANGENCY; THENCE NORTH 90°00'00" WEST ALONG SAID RIGHT-OF-WAY LINE, 34.75 FEET; THENCE NORTH 00°40'23" EAST ALONG SAID EAST RIGHT-OF-WAY LINE, 255.67 FEET TO THE POINT OF BEGINNING.

ABOVE DESCRIBED PARCEL CONTAINS 45.154 ACRES, MORE OR LESS.

SHEET: 1 OF 3

JOB NUMBER: D 22-005.D

DRAWN BY: JC SCHABORT
CHECKED BY: K. WILLIAMS
DATE: 08/04/08
FIELD WORK DATE: N/A
FIELD BOOK/PAGES: N/A

BY:	DATE:	REVISIONS

SKETCH AND LEGAL DESCRIPTION
PARCEL 1 - NE NEIGHBORHOOD
PHASE 1
BEDNER FARMS

F.R.S. & ASSOCIATES, INC.
LAND SURVEYORS AND LAND PLANNERS
CERTIFICATE OF AUTHORIZATION NO. LB 4241
2257 VISTA PARKWAY, SUITE 4
WEST PALM BEACH, FLORIDA 33411
PHONE (561) 478-7178
Web Site: www.frssurvey.com

T:\Draw\Indrio - Bedner Farms\Civil 3D Drawings\Bedner - NE Neighborhood (sketch and legal SP2 and SP3)(04.26.2024).dwg May 01, 2024 - 3:39pm

TOGETHER WITH:

PARCEL 2 NORTH

BEING A PORTION OF THE PLAT OF FORT PIERCE FARMS, ACCORDING TO THE PLAT THEREOF RECORDED IN PLAT BOOK 2, PAGE 7, PUBLIC RECORDS OF ST. LUCIE COUNTY, FLORIDA, SAID PORTION BEING IN THE WEST HALF (W.1/2) OF THE NORTHWEST QUARTER (NW 1/4) OF SECTION 16, AND IN THE EAST HALF (E.1/2) OF THE NORTHEAST QUARTER (NE 1/4) OF SECTION 17, TOWNSHIP 34 SOUTH, RANGE 39 EAST, BEING THAT PART LYING NORTH OF SPANISH LAKES BOULEVARD AS RECORDED IN OFFICIAL RECORDS BOOK 3762, PAGE 2597, AND LYING WEST OF KOBLEGARD ROAD AS RECORDED IN DEED BOOK 78, PAGE 288 AND IN OFFICIAL RECORDS BOOK 3762, PAGE 2597 OF SAID PUBLIC RECORDS, SAID PORTION BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

COMMENCING AT THE EAST QUARTER CORNER OF SAID SECTION 17; THENCE NORTH 0°32'06" EAST (STATE PLANE GRID BEARING DATUM) ALONG THE EAST LINE OF SECTION 17, A DISTANCE OF 1393.69 FEET TO THE NORTH RIGHT-OF-WAY LINE OF SAID SPANISH LAKES BOULEVARD, BEING THE **POINT OF BEGINNING** OF THE PARCEL DESCRIBED HEREIN; THENCE SOUTH 82°23'18" WEST ALONG THE NORTH RIGHT-OF-WAY LINE OF SAID SPANISH LAKES BOULEVARD, 570.46 FEET TO A POINT OF CURVATURE; THENCE WESTERLY ALONG AN ARC OF A CURVE CONCAVE TO THE NORTH, HAVING A RADIUS OF 1450.00 FEET, A CENTRAL ANGLE OF 30°55'35, AN ARC DISTANCE OF 782.67 FEET TO A NON-TANGENT POINT ON THE WEST LINE OF THE EAST HALF (E. 1/2) OF THE NORTHEAST QUARTER OF SECTION 17, THROUGH WHICH A RADIAL LINE BEARS NORTH 23°18'53" EAST; THENCE NORTH 0°30'19.0" EAST ALONG SAID WEST LINE, 1191.59 FEET TO A POINT ON A LINE THAT IS 40 FEET SOUTH OF AND PARALLEL WITH THE NORTH LINE OF SECTION 17; THENCE NORTH 89°39'59" EAST ALONG SAID PARALLEL LINE, 1332.37 FEET TO THE EAST LINE OF SECTION 17; THENCE SOUTH 00°32'06" WEST ALONG THE WEST LINE OF SECTION 16, A DISTANCE OF 5.00 FEET; THENCE SOUTH 89°48'23" EAST ALONG A LINE THAT IS 45 FEET SOUTH OF AND PARALLEL WITH THE NORTH LINE OF SECTION 16, A DISTANCE OF 1291.24 FEET TO WEST RIGHT-OF-WAY LINE OF SAID KOBLEGARD ROAD; THENCE SOUTH 00°40'23" WEST ALONG SAID WEST LINE, 255.77 FEET; THENCE SOUTH 90°00'00" WEST ALONG SAID RIGHT-OF-WAY LINE, 35.25 FEET TO A NON-TANGENT POINT OF CURVATURE THROUGH WHICH A LINE, RADIAL TO THE SUBSEQUENT CURVE, BEARS NORTH 89°53'55" WEST; THENCE SOUTHERLY ALONG THE WEST RIGHT-OF-WAY LINE OF KOBLEGARD ROAD BEING AN ARC OF A CURVE CONCAVE TO THE WEST HAVING A RADIUS OF 4950.00 FEET, A CENTRAL ANGLE OF 02°57'46", AN ARC LENGTH OF 255.97 FEET; THENCE NORTH 89°51'26" WEST ALONG THE NORTH LINE OF PARCEL 101 AS DESCRIBED IN SAID OFFICIAL RECORD BOOK 3762, PAGE 2597, A DISTANCE OF 397.71 FEET; THENCE SOUTH 00°40'23" WEST ALONG THE WEST LINE OF SAID PARCEL 101, A DISTANCE OF 666.03 FEET TO THE NORTH RIGHT-OF-WAY LINE OF SAID SPANISH LAKES BOULEVARD; THENCE NORTH 89°51'26" WEST ALONG SAID RIGHT-OF-WAY LINE, 310.57 FEET TO A POINT OF CURVATURE; THENCE WESTERLY ALONG AN ARC OF A CURVE CONCAVE TO THE SOUTH HAVING A RADIUS OF 3050.00 FEET, A CENTRAL ANGLE OF 07°45'16", AN ARC LENGTH OF 412.79 FEET TO A POINT OF TANGENCY; THENCE SOUTH 82°23'18" WEST ALONG THE NORTH RIGHT-OF-WAY LINE OF SAID SPANISH LAKES BOULEVARD, 130.79 FEET TO THE POINT OF BEGINNING.

ABOVE DESCRIBED PARCEL CONTAINS 67.178 ACRES, MORE OR LESS.

AND FURTHER DESCRIBED IN THE FOLLOWING PAGES:

Exhibit "B"

The debt assessment lien is being placed on property described in the attached legal description. For notice purposes, listed below are the potentially applicable County Property Appraiser parcels, and property owners, developers/potential property owners, and developers that will be included on a mailing list related to debt assessments:

Parcel ID	Owner	Address	City | State | Zip
1317-111-0003-000-8	S7 Grove, LLC	11509 Highland Farm Road	Potomac, MD 20854
1316-221-0002-000-6	S7 Grove, LLC	11509 Highland Farm Road	Potomac, MD 20854
1316-211-0001-000-8	S7 Grove, LLC	11509 Highland Farm Road	Potomac, MD 20854

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

4E

RESOLUTION 2026-13

[SECTION 170.08, F.S. DEBT ASSESSMENT RESOLUTION FOR THE GROVES OF ST. LUCIE COUNTY CDD MASTER LIEN]

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

WHEREAS, the Groves of St. Lucie County Community Development District ("**District**") is a local unit of special-purpose government established pursuant to the Uniform Community Development District Act of 1980, Chapter 190, *Florida Statutes,* as amended ("**Act**"); and

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

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

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT AS FOLLOWS:

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

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

The Capital Improvement Plan

a. The District is authorized by Chapter 190, *Florida Statutes*, to finance, fund, plan, establish, acquire, install, equip, operate, extend, construct, or reconstruct roadways, sewer and water distribution systems, stormwater management/earthwork

improvements, landscape, irrigation and entry features, conservation and mitigation, street lighting and other infrastructure projects and services necessitated by the development of, and serving lands within, the District; and

b. On January 22, 2026, and pursuant to Section 170.03, *Florida Statutes*, among other laws, the Board adopted Resolution 2026-03 ("**Declaring Resolution**"), and in doing so determined to undertake a capital improvement plan to install, plan, establish, construct or reconstruct, enlarge, equip, acquire, operate and/or maintain the District's capital improvements planned for the lands within the District ("**Project**"); and

c. The Project is described in the Declaring Resolution and the *Engineer's Report* ("**Engineer's Report,**" attached hereto as **Exhibit A** and incorporated herein by this reference), and the plans and specifications for the Project are on file in the offices of the District Manager at c/o Wrathell, Hunt & Associates, LLC, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431 ("**District Records Office**"); and

The Debt Assessment Process

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

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

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

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

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

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

j. On March 30, 2026, the Board conducted such public hearing and heard and considered all complaints and testimony as to the matters described above; the Board further met as an "Equalization Board;" and the Board has made such modifications in the preliminary assessment roll as it deems necessary, just and right in the making of the final assessment roll; and

Equalization Board Additional Findings

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

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

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

iii. The estimated costs of the Project is as specified in the Engineer's Report and Assessment Report (defined below), and the amount of such costs is reasonable and proper; and

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

v. The Project benefits the Assessment Area as set forth in the Assessment Report; and

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

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

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

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

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

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

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

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

6. **EQUALIZATION, APPROVAL, CONFIRMATION AND LEVY OF DEBT ASSESSMENTS.** The Debt Assessments imposed on the parcels specially benefited by the Project within the Assessment Area, all as specified in the final assessment roll set forth in **Exhibit B**, attached hereto, are hereby equalized, approved, confirmed and levied.

Immediately following the adoption of this Resolution, the lien of Debt Assessments as reflected in **Exhibit B**, attached hereto, shall be recorded by the Secretary of the District in the District's "**Improvement Lien Book**." The Debt Assessments levied against each respective parcel shown on such final assessment roll and interest, costs, and penalties thereon, as hereafter provided, shall be and shall remain a legal, valid and binding first lien on such parcel, coequal with the lien of all state, county, district, municipal or other governmental taxes and superior in dignity to all other liens, titles, and claims.

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

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

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

c. ***Contributions.*** In connection with the issuance of a series of the Bonds, the project developer may request that any related Debt Assessments be reduced for certain product types. To accomplish any such requested reduction, and pursuant to the terms of an applicable acquisition agreement, and this resolution, the developer will agree to provide a contribution of infrastructure, work product, or land based on the lesser of cost basis or appraised value, comprising a portion of the Project and to meet the minimum requirements set forth in the Assessment Report, if any. Any such contributions shall not be eligible for payment under the Bonds.

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

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

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

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

term debt as actually issued by the District.

b. ***Prepayment.*** Subject to the provisions of any supplemental assessment resolution, any owner of property subject to the Debt Assessments may, at its option, pre-pay the entire amount of the Debt Assessment any time, or a portion of the amount of the Debt Assessment up to two times, plus accrued interest to the next succeeding interest payment date (or the second succeeding interest payment date if such prepayment is made within forty-five (45) calendar days before an interest payment date (or such other time as set forth in the supplemental indenture for the applicable series of bonds secured by the Debt Assessments in question)), attributable to the property subject to Debt Assessments owned by such owner. Prepayment of Debt Assessments does not entitle the property owner to any discounts for early payment. If authorized by a supplemental assessment resolution, the District may grant a discount equal to all or a part of the payee's proportionate share of the cost of the applicable Project consisting of bond financing costs, such as capitalized interest, funded reserves, and bond discount included in the estimated cost of the applicable Project, upon payment in full of any Debt Assessment during such period prior to the time such financing costs are incurred as may be specified by the District.

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

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

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

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

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

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

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

d. The foregoing is based on the District's understanding that the community would be

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

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

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

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

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

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

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

[CONTINUED ON NEXT PAGE]

APPROVED AND ADOPTED THIS 30th DAY OF MARCH, 2026.

ATTEST:

THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT

_____ _____

Secretary/Assistant Secretary

Chair/Vice Chair, Board of Supervisors

Exhibit A: *Engineer's Report*

Exhibit B: *Master Special Assessment Methodology Report*

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

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THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

5A

USA TODAY CO.

PO Box 631244 Cincinnati, OH 45263-1244

LocaliQ

AFFIDAVIT OF PUBLICATION

Ruth Viola
The Groves of St Lucie County CDD
2300 Glades RD
Suite 410W
Boca Raton FL 33431-7386

STATE OF WISCONSIN, COUNTY OF BROWN

Before the undersigned authority personally appeared, who on oath says that he or she is the Legal Advertising Representative of the Indian River Press Journal/St Lucie News Tribune/Stuart News, newspapers published in Indian River/St Lucie/Martin Counties, Florida; that the attached copy of advertisement, being a Legal Ad in the matter of Govt Public Notices, was published on the publicly accessible websites of Indian River/St Lucie/Martin Counties, Florida, or in a newspaper by print in the issues of, on:

SCN StLucie-IndianRv-Stuart 02/17/2026
SCN tcpalm.com 02/17/2026

Affiant further says that the website or newspaper complies with all legal requirements for publication in chapter 50, Florida Statutes.
Subscribed and sworn to before me, by the legal clerk, who is personally known to me, on 02/17/2026

Legal Clerk

Notary, State of WI, County of Brown

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Notary Public
State of Wisconsin

NOTICE OF RULE DEVELOPMENT BY THE THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT

In accordance with Chapters 120 and 190, Florida Statutes, The Groves of St. Lucie County Community Development District ("**District**") hereby gives notice of its intention to develop Rules of Procedure to govern the operations of the District. The proposed rule number is 2026-1.

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

The purpose and effect of the [revised Rules of Procedure] is [to provide for efficient and effective District operations and to ensure compliance with recent changes to Florida law]. The specific grant of rulemaking authority for the adoption of the proposed Rules of Procedure includes [Sections 190.011(5), 190.011(15) and 190.035, Florida Statutes]. The specific laws implemented in the proposed Rules of Procedure include, but are not limited to, Sections 112.08, 112.3143, 112.31446, 112.3145, 119.07, 119.0701, 120.54, 120.542, 120.5435, 120.56, 120.69, 120.81, 189.053, 189.069, 190.006, 190.007, 190.008, 190.011, 190.033, 190.035, 218.33, 218.391, 255.05, 255.0518, 255.0525, 255.20, 286.0105, 286.011, 286.012, 286.0113, 286.0114, 287.017, 287.055, and 287.084, Florida Statutes.

A copy of the proposed Rules of Procedure and the related incorporated documents, if any, may be obtained by contacting the District Manager, c/o Wrathell, Hunt and Associates, LLC, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431 (561) 571-0010.

Cindy Cerbone, District Manager
The Groves of St. Lucie County Community Development District
TCN- 12089240 02/17/26

USA TODAY CO.

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Boca Raton FL 33431-7386

STATE OF WISCONSIN, COUNTY OF BROWN

Before the undersigned authority personally appeared, who on oath says that he or she is the Legal Advertising Representative of the Indian River Press Journal/St Lucie News Tribune/Stuart News, newspapers published in Indian River/St Lucie/Martin Counties, Florida; that the attached copy of advertisement, being a Legal Ad in the matter of Govt Public Notices, was published on the publicly accessible websites of Indian River/St Lucie/Martin Counties, Florida, or in a newspaper by print in the issues of, on:

SCN StLucie-IndianRv-Stuart 02/24/2026
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Affiant further says that the website or newspaper complies with all legal requirements for publication in chapter 50, Florida Statutes.
Subscribed and sworn to before me, by the legal clerk, who is personally known to me, on 02/24/2026

Legal Clerk

Notary, State of WI, County of Brown

9-3-29

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NOTICE OF RULEMAKING REGARDING THE RULES OF PROCEDURE OF THE THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT

In accordance with Chapters 120 and 190, *Florida Statutes*, the District hereby gives the public notice of its intent to adopt its proposed Rules of Procedure (the "**Proposed Rule**"). The Proposed Rule number is 2026-1. Prior notice of rule development relative to the Proposed Rule was published in the St. Lucie Tribune on February 17, 2026.

A public hearing will be conducted by the Board of Supervisors (the "**Board**") of The Groves of St. Lucie County Community Development District (the "**District**") on March 30, 2026, at 11:00 a.m. at the Fairfield Inn & Suites Ft. Pierce, 6502 Metal Dr., Ft. Pierce, Florida 34945, relative to the adoption of the Proposed Rule. Pursuant to Sections 190.011(5) and 190.012(3), *Florida Statutes*, the Proposed Rule will not require legislative ratification.

The specific grant of rulemaking authority for the adoption of the Proposed Rule includes [Sections 190.011(5), 190.011(15) and 190.035, Florida Statutes]. The specific laws implemented in the Proposed Rule include, but are not limited to, [Sections 112.09, 112.3143, 112.31446, 112.3145, 119.07, 119.0701, 120.54, 120.542, 120.5435, 120.56, 120.69, 120.81, 189.053, 189.069, 190.006, 190.007, 190.008, 190.011, 190.033, 190.035, 218.33, 218.391, 255.05, 255.0518, 255.0525, 255.20, 286.0105, 286.011, 286.012, 286.0113, 286.0114, 287.017, 287.055, and 287.084, Florida Statutes].

A statement of estimated regulatory costs, as defined in Section 120.541(2), Florida Statutes, has not been prepared relative to the Proposed Rule. Any person who wishes to provide the District with a proposal for a lower cost regulatory alternative as provided by Section 120.541(1), Florida Statutes, must do so in writing within twenty one (21) days after publication of this notice to the District Manager's Office.

For more information regarding the public hearing, the Proposed Rule, or for a copy of the Proposed Rule and the related incorporated documents, if any, please contact the District Manager c/o Wrathell, Hunt and Associates, LLC, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431 (561) 571-0010 wrathellc@whhassociates.com (the "**District Manager's Office**").

This public hearing may be continued to a date, time, and place to be specified on the record at the hearing without additional notice. If anyone chooses to appeal any decision of the Board with respect to any matter considered at the public hearing, such person will need a record of the proceedings and should accordingly ensure that a verbatim record of the proceedings is made which includes the testimony and evidence upon which such appeal is to be based. At the public hearing, staff or Supervisors may participate in the public hearing by speaker telephone.

Pursuant to the provisions of the Americans with Disabilities Act, any person requiring special accommodations at this public hearing because of a disability or physical impairment should contact the District Manager's Office at least forty-eight (48) hours prior to the public hearing. If you are hearing or speech impaired, please contact the Florida Relay Service at 1-800-955-8771 or 1-800-955-8770 for aid in contacting the District Manager's Office.

Cindy Cerbone, District Manager
The Groves of St. Lucie County Community Development District
Pub: Feb. 24, 2026
TCN12091108

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

5B

RESOLUTION 2026-14

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

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

WHEREAS, Chapter 190, *Florida Statutes*, authorizes the District to adopt rules to govern the administration of the District and to adopt resolutions as may be necessary for the conduct of District business; and

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

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

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT:

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

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

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

PASSED AND ADOPTED this 30th day of March, 2026.

ATTEST:

THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT

Secretary/Assistant Secretary

Chair/Vice Chair, Board of Supervisors

Exhibit A: Rules of Procedure

Exhibit A
Rules of Procedure

RULES OF PROCEDURE
THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT

EFFECTIVE AS OF MARCH 30, 2026

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Rule 1.0 General.

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

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

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

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

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

Rule 1.1 Board of Supervisors; Officers and Voting.

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

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

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

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

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

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

(a) The Chairperson must be a member of the Board. If the Chairperson resigns from that office or ceases to be a member of the Board, the Board shall select a Chairperson. The Chairperson serves at the pleasure of the Board. The Chairperson shall be authorized to execute resolutions and

contracts on the District's behalf. The Chairperson shall convene and conduct all meetings of the Board. In the event the Chairperson is unable to attend a meeting, the Vice-Chairperson shall convene and conduct the meeting. The Chairperson or Vice-Chairperson may delegate the responsibility of conducting the meeting to the District's manager ("**District Manager**") or District Counsel, in whole or in part.

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

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

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

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

previously approved by the Board, the Secretary or any Assistant Secretary may execute such document.

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

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

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

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

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

(6) Votes Required. No Board member who is present at any meeting of the District Board at which an official decision, ruling, or other official act is to be taken or adopted may abstain from voting in regard to any such decision, ruling, or act; and a vote shall be recorded or counted for each such Board member present, except when, with respect to any such member, there is, or appears to be, a possible conflict of interest under the provisions of s. 112.311, s. 112.313, or s. 112.3143 of the Florida Statutes.

(7) Voting Conflict of Interest. The Board shall comply with Section 112.3143 of the Florida Statutes, so as to ensure the proper disclosure of conflicts of interest on matters coming before the Board for a vote. For the purposes of this section, "**voting conflict of interest**" shall be governed by the Florida Constitution and Chapters 112 and 190 of the Florida Statutes, as amended from time to time. Generally, a voting conflict exists when a Board member is called upon to vote on an item which would inure to the Board member's special private gain or loss or

the Board member knows would inure to the special private gain or loss of a principal by whom the Board member is retained, the parent organization or subsidiary of a corporate principal, a business associate, or a relative including only a father, mother, son, daughter, husband, wife, brother, sister, father-in-law, mother-in-law, son-in-law, and daughter-in-law.

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

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

The Board's Secretary shall prepare a Memorandum of Voting Conflict (Form 8B) which shall then be signed by the Board member, filed with the Board's Secretary, and provided for attachment to the minutes of the meeting within fifteen (15) days of the meeting.

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

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

(d) In the event that a Board member elected at a landowner's election or appointed to fill a vacancy of a seat last filled at a landowner's election, has a continuing conflict of interest, such Board member is permitted to

file a Memorandum of Voting Conflict at any time in which it shall state the nature of the continuing conflict. Only one such continuing Memorandum of Voting Conflict shall be required to be filed for each term the Board member is in office.

Specific Authority: §§ 190.011(5), 190.011(15), Fla. Stat.
Law Implemented: §§ 112.3143, 190.006, 190.007, 286.012, Fla. Stat.

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

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

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

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

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

(d) Adopted engineer's reports;

(e) Adopted assessment methodologies/reports;

(f) Adopted disclosure of public financing;

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

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

(i) District policies and rules;

(j) Fiscal year end audits; and

(k) Adopted budget for the current fiscal year.

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

(2) Public Records. District public records include all documents, papers, letters, maps, books, tapes, photographs, films, sound recordings, data processing software, or other material, regardless of the physical form, characteristics, or means of transmission, made or received in connection with the transaction of official business of the District. All District public records not otherwise restricted by law may be copied or inspected at the District Manager's office during regular business hours. Certain District records can also be inspected and copied at the

District's local records office during regular business hours. All written public records requests shall be directed to the Secretary who by these rules is appointed as the District's records custodian. Regardless of the form of the request, any Board member or staff member who receives a public records request shall immediately forward or communicate such request to the Secretary for coordination of a prompt response. The Secretary, after consulting with District Counsel as to the applicability of any exceptions under the public records laws, shall be responsible for responding to the public records request. At no time can the District be required to create records or summaries of records, or prepare opinions regarding District policies, in response to a public records request.

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

(4) Fees; Copies. Copies of public records shall be made available to the requesting person at a charge of $0.15 per page for one-sided copies and $0.20 per page for two-sided copies if not more than 8 ½ by 14 inches. For copies of public records in excess of the sizes listed in this section and for outside duplication services, the charge shall be equal to the actual cost of reproduction. Certified copies of public records shall be made available at a charge of one dollar ($1.00) per page. If the nature or volume of records requested requires extensive use of information technology resources or extensive clerical or supervisory assistance, the District may charge, in addition to the duplication charge, a special service charge that is based on the cost the District incurs to produce the records requested. This charge may include, but is not limited to, the cost of information technology resource, employee labor, and fees charged to the District by consultants employed in fulfilling the request. In cases where the special service charge is based in whole or in part on the costs incurred by the District due to employee labor, consultant fees, or other forms of labor, those portions of the charge shall be calculated based on the lowest labor cost of the individual(s) who is/are qualified to perform the labor, taking into account the nature or volume of the public records to be inspected or copied. The charge may include the labor costs of supervisory and/or clerical staff whose assistance is required to complete the records request, in accordance with Florida law. For purposes of this Rule, the word "**extensive**" shall mean that it will take more than 15 minutes to locate, review for confidential information, copy and re-file the requested material. In cases where extensive personnel time is determined by the District to be necessary to safeguard original records being inspected, the special service charge provided for in this section shall apply. If the total fees, including but not limited to special service charges, are anticipated to exceed twenty-five dollars ($25.00), then, prior to commencing work on the request, the District will inform the person

making the public records request of the estimated cost, with the understanding that the final cost may vary from that estimate. If the person making the public records request decides to proceed with the request, payment of the estimated cost is required in advance. Should the person fail to pay the estimate, the District is under no duty to produce the requested records. After the request has been fulfilled, additional payments or credits may be due. The District is under no duty to produce records in response to future records requests if the person making the request owes the District for past unpaid duplication charges, special service charges, or other required payments or credits.

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

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

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

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

Rule 1.3 Public Meetings, Hearings, and Workshops.

(1) Notice. Except in emergencies, or as otherwise authorized or required by statute or these Rules, at least seven (7) days', but not more than thirty (30) days' public notice shall be given of any public meeting, hearing or workshop of the Board. Public notice shall be given by publication in a newspaper of general circulation within the county or counties in which the District is located. A newspaper is deemed to be a newspaper of "**general circulation**" in the county in which the District is located if such newspaper has been in existence for two (2) years at the time of publication of the applicable notice (unless no newspaper within the county has been published for such length) and satisfies the criteria of section 50.011(1) of the Florida Statutes, or if such newspaper is a direct successor of a newspaper which has been so published, as such provisions may be amended from time to time by law. The annual meeting notice required to be published by Section 189.015 of the Florida Statutes, shall be published as provide in Chapter 50 of the Florida Statutes, and such notice published consistent therewith shall satisfy the requirement to give at least seven (7) days' public notice as required herein. Each Notice shall state, as applicable:

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

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

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

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

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

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

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

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

(3) Agenda. The District Manager, under the guidance of District Counsel and the Chairperson or Vice-Chairperson, shall prepare an agenda of the meeting/hearing/workshop. The agenda and any meeting materials available in an electronic format, excluding any i) confidential and ii) confidential and exempt information, shall be available to the public at least seven (7) days before the meeting/hearing/workshop, except in an emergency. Meeting materials shall be defined as, and limited to, the agenda, meeting minutes, resolutions, and agreements of the District that District staff deems necessary for Board approval. Inclusion of additional materials for Board consideration other than those defined herein as "meeting materials" shall not convert such materials into "meeting materials." For good cause, the agenda may be changed after it is first made available for distribution, and additional materials may be added or provided under separate cover at the meeting. The requirement of good cause shall be liberally construed to allow the District to efficiently conduct business and to avoid the expenses associated with special meetings.

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

Call to order
Roll call
Public comments
Organizational matters
Review of minutes
Specific items of old business
Specific items of new business
Staff reports
(a) District Counsel
(b) District Engineer
(c) District Manager

1. Financial Report
2. Approval of Expenditures

Supervisor's requests and comments
Adjournment

(4) Minutes. The Secretary shall be responsible for preparing and keeping the minutes of each meeting of the Board. Minutes shall be corrected and approved by the Board at a subsequent meeting. The Secretary may work with other staff members in preparing draft minutes for the Board's consideration.

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

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

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

(8) Budget Hearing. Notice of hearing on the annual budget(s) shall be in accord with Section 190.008 of the Florida Statutes. Once adopted in accord with Section 190.008 of the Florida Statutes, the annual budget(s) may be amended from time to time by action of the Board or as otherwise provided in the resolution approving

the annual budget(s). Approval of invoices by the Board in excess of the funds allocated to a particular budgeted line item shall serve to amend the budgeted line item.

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

(10) Participation by Teleconference/Videoconference. District staff may participate in Board meetings by teleconference or videoconference. Board members may also participate in Board meetings by teleconference or videoconference if in the good judgment of the Board extraordinary circumstances exist; provided however, at least three Board members must be physically present at the meeting location to establish a quorum. Such extraordinary circumstances shall be presumed when a Board member participates by teleconference or videoconference, unless a majority of the Board members physically present determines that extraordinary circumstances do not exist.

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

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

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

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

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

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

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

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

Rule 1.4 Internal Controls to Prevent Fraud, Waste and Abuse

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

(a) Prevent and detect "**fraud**," "**waste**" and "**abuse**" as those terms are defined in section 11.45(1),

(b) Florida Statutes; and

(c) Promote and encourage compliance with applicable laws, rules contracts, grant agreements, and best practices; and

(d) Support economical and efficient operations; and

(e) Ensure reliability of financial records and reports; and

(f) Safeguard assets.

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

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

Rule 2.0 Rulemaking Proceedings.

(1) Commencement of Proceedings. Proceedings held for adoption, amendment, or repeal of a District rule shall be conducted according to these Rules. Rulemaking proceedings shall be deemed to have been initiated upon publication of a Notice of Rule Development by the District as required by Section 2 of this Rule. A "**rule**" is a District statement of general applicability that implements, interprets, or prescribes law or policy, or describes the procedure or practice requirements of the District. Nothing herein shall be construed as requiring the District to consider or adopt rules unless required by Chapter 190 of the Florida Statutes. Policies adopted by the District which do not consist of rates, fees, rentals or other monetary charges may be, but are not required to be, implemented through rulemaking proceedings.

(2) Requirements of a Rule. All District rules as drafted shall:

(a) Contain only one subject;

(b) Include readable language, meaning it avoids i) the use of obscure words and unnecessarily long or complicated constructions, and ii) the use of unnecessary technical or specialized language that is understood only by members of particular trades or professions;

(c) Be indefinite such that the rule does not include a provision whereby the rule, or a portion thereof, automatically expires or is repealed on a specific date or at the end of a specified period, unless otherwise expressly authorized by law; and

(d) Only incorporate material by reference in compliance with Section 120.54(1)(i) of the Florida Statutes.

(3) Statement of Estimated Regulatory Costs. Before adopting, amending, or repealing any rule, other than an emergency rule, the District may prepare a statement of estimated regulatory costs ("**SERC**") based on the factors set forth in Section 120.541(2) of the Florida Statutes. The District shall prepare a SERC for a proposed rule if in accordance with the requirements of Section 120.541(2) of the Florida Statutes if: i) the proposed rule will have an adverse economic impact on small business; or ii) the proposed rule is likely to directly or indirectly increase regulatory costs in excess of $200,000 in the aggregate in the state within one (1) year after implementation of the rule.

(4) Notice of Rule Development.

(a) Except when the intended action is the repeal of a rule, the District shall provide notice of the development of a proposed rule ("**Notice of Rule Development**") setting forth the following:

(i) the subject area to be addressed by rule development;

(ii) A short, plain explanation of the purpose and effect of the proposed rule;

(iii) The grant of rulemaking authority for the proposed rule;

(iv) The law being implemented;

(v) The proposed rule number; and

(vi) If available, either the preliminary text of the proposed rule and any incorporated documents, or a statement of how a person may promptly obtain, without cost, a copy of any preliminary draft of such rule or documents.

(b) The Notice of Rule Development shall be published in a newspaper of general circulation within the county or counties in which the District is located at least seven (7) days prior to the Notice of Rulemaking required by Section 5 of this Rule, and at least thirty-five (35) days prior to the intended action.

(5) Notice of Rulemaking.

(a) Prior to the adoption, amendment, or repeal of any rule other than an emergency rule, the District shall provide notice of its intended action (the "**Notice of Rulemaking**") setting forth the following:

(i) The proposed rule number;

(ii) The grant of rulemaking authority for the proposed rule;

(iii) The law being implemented or interpreted;

(iv) The name, e-mail address, and telephone number of the agency employee who may be contacted regarding the intended action;

(v) A concise summary of the District's statement of the estimated regulatory costs, if one has been prepared, based on the factors set forth in Section 120.541(2) of the Florida Statutes, that describes the regulatory impact of the rule in readable language;

(vi) The District's website where the statement of estimated regulatory costs can be viewed, in its entirety, if one has been prepared;

(vii) A statement that any person who wishes to provide the District with a lower cost regulatory alternative as provided by Section 120.541(1), must do so in writing within twenty-one (21) days after publication of the notice;

(viii) A statement as to whether, based on the SERC or other information expressly relied upon and described by the District if no statement of regulatory costs is required, the proposed rule is expected to require legislative ratification pursuant to Section 120.541(3) of the Florida Statutes;

(ix) The date, time, and location of the public hearing on the proposed rule;

(x) The name, address, and telephone number of the District contact person who can provide information about the public hearing; and

(xi) A reference to both the date on which and the place where the Notice of Rule Development required by Section 4 of this Rule appeared, except when the intended action is the repeal of a rule.

(b) The Notice of Rulemaking shall be published in a newspaper of general circulation within the county or counties in which the District is located at least seven (7) days after the Notice of Rule Development required by Section 4 of this Rule, and at least twenty-eight (28) days prior to the intended action. If the Notice of Rulemaking is not published within one-hundred eighty (180) days of the publication of the Notice of Rule Development, then the District's Board shall approve a concise statement at least seven (7) days prior to the conclusion of the one-hundred eighty (180) day timeframe identifying the reason for the delay, which may be supplemented quarterly until the District has adopted the proposed rule.

(c) The Notice of Rulemaking shall be mailed or delivered electronically to all persons named in the proposed rule and to all persons who, at least fourteen (14) days before publication of the notice, have made requests of the District for advance notice of its rulemaking proceedings. Any person may file a written request with the District Manager to receive notice of the District's rulemaking proceedings. Such persons must furnish a mailing address or e-mail address, and may be required to pay the cost of copying and mailing as applicable.

(d) As of the date of publication of the Notice of Rulemaking, the Board shall make available for public inspection and shall provide, upon request and payment of the cost of copies, the proposed rule, including all material proposed to be incorporated by reference.

(6) Modification of Rules.

(a) Technical Changes.

(i) Prior to rule adoption, the District shall publish a notice of correction ("**Notice of Correction**") if any of the information that is required to be included in the Notice of Rulemaking, including technical changes that correct citations or grammatical, typographical or similar errors that do not otherwise affect the substance of the rule, is omitted or is incorrect. A Notice of Correction cannot be used to make substantive changes to the rule text. The Notice of Correction shall be published in a newspaper of general circulation within the county or counties in which the District is located at least seven (7) days prior to the intended action.

(ii) After rule adoption, a technical change to a rule may be approved at any time by the District. Promptly thereafter, a Notice of Correction shall be published by the District in the manner set forth in Section 6(a)(i) of this Rule.

(b) Substantive Changes.

(i) Prior to rule adoption, the District shall publish a notice of change ("**Notice of Change**") if there is any substantive change, other than a technical change that corrects citations or grammatical, typographical or similar errors that do not otherwise affect the substance of the rule, to a proposed rule, including any material incorporated by reference, or to a SERC. The Notice of Change must address a summary of the change and shall be published in a newspaper of general circulation within the county or counties in which the District is located at least twenty-one (21) days prior to the intended action. The Notice of Change shall also be set to those persons set forth in Section 5(C) of this Rule that have made requests of the District for advance notice of its rulemaking proceedings. Any substantive change must be either be:

1. Supported by the record of the public hearing held on the proposed rule;

2. In response to written materials submitted to the District; or

3. In response to an objection with the proposed rule by the District Board.

(ii) After rule adoption, a substantive change to a rule shall be effectuated by initiating rulemaking as set forth in this Rule.

(7) Withdrawal of Proposed Rules.

(a) Prior to the adoption of a rule, the District may elect to withdraw the proposed rule in whole or in part. After a rule has become effective, the District may only amend or repeal the rule through initiating the rulemaking procedures set forth in this Rule.

(b) Prior to the adoption of a rule, the District shall withdraw the proposed rule if the District has either failed to adopt such rule within one-hundred eighty (180) days of the publication of the Notice of Rule Development required by Section 4 of this Rule or to approve a concise statement at least seven (7) days prior to the conclusion of the one-hundred eighty (180) day timeframe identifying the reason for the delay, which may be supplemented quarterly until the District has adopted the proposed rule.

(c) In the event of a withdrawal of a proposed rule, the District shall publish a notice ("**Notice of Rule Withdrawal**") in a newspaper of general circulation within the county or counties in which the District is located, and shall provide notice to those persons set forth in Section 5(c) of this Rule that have made requests of the District for advance notice of its rulemaking proceedings.

(d) Within fifteen (15) days after the end of each calendar quarter, the District shall compile and post on its website a list of each failure to publish a Notice of Rulemaking within the timeframe prescribed by Section 5(b) of this Rule, which list shall include the information set forth in Section 120.54(3)(d)(7) of the Florida Statutes. The District is only required to provide such posting in any calendar quarter(s) in which there is an actual failure to timely publish a Notice of Rulemaking, if any.

(8) Rule Development Workshops.

(a) Whenever requested in writing by any affected person, the District must conduct a rule development workshop prior to proposing rules for adoption for the purposes of rule development or information gathering for the preparation of the SERC, unless the Chairperson explains in writing why a workshop is unnecessary. The District may initiate a rule development workshop, but is not required to do so.

(b) If a workshop is held, the District must ensure that the person(s) responsible for preparing the rule and the SERC, if applicable, are available to explain the District's proposed rule and to respond to questions or comments regarding the rule being developed.

(c) The notice of any workshop shall be published in a newspaper of general circulation within the county or counties in which the District is located at least fourteen (14) days prior to the workshop setting forth the following:

(i) The place, date, and time of the workshop;

(ii) The subject area that will be addressed; and

(iii) The District Manager's contact information.

(9) Petitions to Initiate Rulemaking.

(a) All Petitions to Initiate Rulemaking Proceedings must contain the name, address, and telephone number of the petitioner, the specific action requested, the specific reason for adoption, amendment, or repeal, the date submitted, the text of the proposed rule, and the facts showing that the petitioner is regulated by the District or has a substantial interest in the rulemaking. District staff shall forward a copy of the petition to the District's Board within seven (7) days of its receipt.

(b) If the petition is directed to an adopted rule, within thirty (30) days following the date of filing a petition, the District shall either i) initiate rulemaking proceedings, ii) otherwise comply with the requested action, or iii) deny the petition with a written statement of its reasons for the denial.

(c) If the petition is directed to an unadopted rule, within thirty (30) days following the date of filing a petition, the District shall either i) initiate rulemaking, or ii) set a public hearing to consider whether the public interest is served adequately by the application of the proposed rule on a case-by-case basis, as contrasted with its formal adoption as a rule.

(i) If the District elects to hold a public hearing, notice of the public hearing ("**Notice of Rulemaking Petition Public Hearing**") shall be published in a newspaper of general circulation within the county or counties in which the District is located. The public hearing shall be held by the District within thirty (30) days after publication of the Notice of Rulemaking Petition Public Hearing.

(ii) Not later than thirty (30) days following the date of the public hearing held pursuant to Section 9(c)(i) of this Rule, the District shall either i) initiate rulemaking proceedings, ii) otherwise comply with the requested action, or iii) deny the petition with a written statement of its reasons for the denial.

1. If the District decides to initiate rulemaking it shall proceed with the rulemaking process as set forth in this Rule.

2. If the District decides to not initiate rulemaking or otherwise comply with the requested action, the District shall publish a statement of its reasons for not initiating rulemaking or otherwise complying with the requested action and of any changes it will make in the scope or application of the unadopted rule (the "**Notice of Denial of Rulemaking Petition**"). The Notice of Denial of Rulemaking Petition shall be published in a newspaper of general circulation within the county or counties in which the District is located.

(d) Nothing in this Rule shall be construed as requiring the District to adopt, amend, or repeal a rule as initiated by petition.

(10) Public Hearing.

(a) The District may, or, upon the written request of any affected person received within twenty-one (21) days after the date of publication of the Notice of Rulemaking, shall, provide a public hearing for the presentation of evidence, argument, and oral statements, within the reasonable conditions and limitations imposed by the District to avoid duplication, irrelevant comments, unnecessary delay, or disruption of the proceedings. When a public hearing is held, the District shall ensure that staff is available to explain the proposed rule and to respond to questions or comments regarding the proposed rule. Written statements may be submitted by any person prior to or at the public hearing. All timely submitted written statements shall be considered by the District and made part of the rulemaking record.

(b) The District shall publish notice of the public hearing ("**Notice of Public Hearing**") in a newspaper of general circulation within the county or counties in which the District is located, either in the text of the Notice of Rulemaking or in a separate publication at least seven (7) days before the scheduled public hearing. The Notice of Public Hearing shall include the following information:

(i) The date, time, and location of the public hearing; and

(ii) The name, address, and telephone number of the District contact person who can provide information about the public hearing.

(11) Emergency Rule Adoption.

(a) The Board may adopt an emergency rule if it finds that immediate danger to the public health, safety, or welfare exists which requires immediate action or if the Legislature authorizes the District to adopt emergency rules. The District may use any procedure which is fair under the circumstances in the adoption of an emergency rule as long as it protects the public interest as determined by the District.

(b) At the time or prior to the adoption of an emergency rule, the District shall post on its website a notice regarding its adoption of the emergency rule (the "**Notice of Emergency Rule**") which includes the specific facts and reasons for finding an immediate danger to the public health, safety, or welfare and its reasons for concluding that procedure used is fair under the circumstances. The Notice of Emergency Rule shall thereafter be promptly published in a newspaper of general circulation within the county or counties in which the District is located, and shall include the following information:

(i) The full text of the rule(s); and

(ii) The District's findings of immediate danger, necessity, and procedural fairness or a citation to the grant of emergency rulemaking authority.

(c) An emergency rule shall be effective immediately upon adoption by the District, or on a date less than twenty (20) days thereafter if specified in the emergency rule if the District finds that a later effective date is necessary because of immediate danger to the public health, safety, or welfare. An emergency rule may not be effective for a period of more than ninety (90) days after adoption and may not be renewable, unless the

District has initiated rulemaking to adopt rules addressing the subject of the emergency rule and either i) a challenge to the proposed rules has been filed and remains pending or ii) the proposed rules are awaiting ratification by the Legislature, if applicable. Nothing in this paragraph prohibits the District from adopting a rule identical to the emergency rule through the non-emergency rulemaking procedures set forth in this Rule.

(i) If an emergency rule is being renewed in accordance with Section 11(d) of this Rule, notice of the renewal of the emergency rule (the "**Notice of Renewal of Emergency Rule**") shall be published before the expiration of the existing emergency rule. The Notice of Renewal of Emergency Rule shall be published in a newspaper of general circulation within the county or counties in which the District is located and shall include the specific facts and reasons for such renewal.

(ii) For emergency rules with an effective period of longer than ninety (90) days which are intended to replace an existing rule, the Rulemaking Record for the existing rule, as required by Section 13 of this Rule, shall specifically identify the emergency rule that is intended to supersede the existing rule as well as the date that the emergency rule was adopted by the District.

(d) The District may supersede an emergency rule in effect through the adoption of another emergency rule before the superseded rule expires. The District shall post on its website and publish a Notice of Emergency Rule, in accordance with Section 11(b) of this Rule, identifying the reason for adopting the superseding rule. The superseding rule shall not be in effect longer than the duration of the effective period of the superseded rule.

(e) The District may make technical changes to an emergency rule within the first seven (7) days after the rule is adopted, and such changes shall be published in a Notice of Correction as set forth in Section 6(a) of this Rule.

(f) The District may repeal an emergency rule before it expires by publishing a notice ("**Notice of Repeal of Emergency Rule**") in a newspaper of general circulation within the county or counties in which the District is located. The Notice of Repeal of Emergency Rule shall include the following information:

(i) The full text of the emergency rule and a summary thereof;

(ii) The rule number; and

(iii) A short and plain explanation as to why the conditions specified in the Notice of Emergency Rule no longer require the emergency rule.

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

(13) Rulemaking Record. In all rulemaking proceedings, the District shall compile and maintain a rulemaking record ("**Rulemaking Record**") which shall be on file with the District at least twenty-one (21) days prior to the proposed adoption date of the rule. The Rulemaking Record shall include, as applicable:

(a) A copy of the rule;

(b) Any material incorporated by reference in the rule;

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

(d) Any SERC for the rule, if required by Section 120.54(3)(b)1. of the Florida Statutes or otherwise prepared, and any information created or used by the District in determining whether a SERC is required;

(e) A statement of the extent to which the proposed rule relates to federal standards on rules on the same subject;

(f) The Notice of Rule Development, Notice of Rulemaking, and notice(s) of any workshops held pursuant to Section 8 of this Rule; and

(g) If an emergency rule is intended to supersede an existing rule, the emergency rule number and the date that the emergency rule was adopted by the District.

(14) Petitions to Challenge Rules.

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

(i) A petition alleging the invalidity of a proposed rule shall be filed within twenty-one (21) days after the date of publication of Notice of Rulemaking, within ten (10) days after the final public hearing is held on the proposed rule; within twenty (20) days after the SERC or revised SERC has been prepared and made available as provided in Section 120.541(1)(d) of the Florida Statutes, if applicable; or within twenty (20) days after the date of publication of the Notice of Rule Withdrawal required by Section 7(c) of this Rule.

(ii) A petition alleging the invalidity of an existing rule may be filed at any time during which the rule is in effect.

(b) The petition seeking an administrative determination must state with particularity the provisions alleged to be invalid with sufficient explanation of the facts or grounds for the alleged invalidity and facts sufficient to show that the person challenging a proposed or existing rule is substantially affected by it. A person who is not substantially affected by the proposed rule as initially noticed, but who is substantially affected by the rule as a result of a change, may challenge any provision of the resulting proposed rule.

(c) The petition shall be filed with the District. Within ten (10) days after receiving the petition, or seven (7) days if the challenge relates to an emergency rule, the Chairperson shall, if the petition complies with the requirements of subsection (b) of this section, designate any member of the Board (including the Chairperson), District Manager, District Counsel, or other person as a hearing officer who shall conduct a hearing within thirty (30) days thereafter, or fourteen (14) days if the challenge relates to an emergency rule, unless the petition is withdrawn or a continuance is granted by agreement of the parties. The failure of the District to follow the applicable rulemaking procedures or requirements in this Rule shall be presumed to be material; however, the District may rebut this presumption by showing that the substantial interests of the petitioner and the fairness of the proceedings have not been impaired.

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

(e) Hearings held under this section shall be de novo in nature. For proposed rules, the petitioner has the burden to prove by a preponderance of the evidence that it would be substantially affected by the proposed rule, and the District has the burden to prove by a preponderance of the evidence

that the proposed rule is not an invalid exercise of delegated legislative authority as to the objections raised. For existing rules, the petitioner has a burden of proving by a preponderance of the evidence that the existing rule is an invalid exercise of District authority as to the objections raised. During the hearing, the hearing officer may:

(i) Administer oaths and affirmations;

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

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

(iv) Enter orders; and

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

(f) Within thirty (30) days after the hearing, or fourteen (14) days of the challenge relate to an emergency rule, the hearing officer shall render a decision and state the reasons therefor in writing. The hearing officer's order shall be considered final agency action. The hearing officer may declare all or part of a proposed or existing rule invalid. For a proposed rule, the proposed rule or provision thereof declared invalid shall not be adopted unless the decision of the hearing officer is reversed on appeal. In the event part of a proposed rule is declared invalid, the District may, in its sole discretion, withdraw the proposed rule in its entirety. For an existing rule, the rule or part thereof declared invalid shall become void when the time for filing an appeal expires. In the event that a proposed or existing rule has been declared invalid in whole or part, the District shall promptly publish notice of such occurrence published in a newspaper of general circulation within the county or counties in which the District is located.

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

(a) Variances and waivers shall be granted when the person subject to the rule demonstrates that the purpose of the underlying statute will be or has been achieved by other means by the person, and when application of the rule would create a substantial hardship or would violate principles of fairness. For purposes of this section, "**substantial hardship**" means a

demonstrated economic, technological, legal, or other type of hardship to the person requesting the variance or waiver. For purposes of this section, "**principles of fairness**" are violated when the literal application of a rule affects a particular person in a manner significantly different from the way it affects other similarly situated persons who are subject to the rule.

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

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

(ii) The type of action requested;

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

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

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

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

(16) Review of Adopted Rules.

(a) By January 1, 2026, District staff shall prepare a report that summarizes the District's existing rules anticipated to be reviewed during the current fiscal year, if any, and the recommended action on each rule (the "**Existing Rule Review Report**"). The Existing Rule Review Report shall be presented to the District's Board at a noticed Board meeting as soon as practicable after preparation by District staff. District staff shall continue to annually

prepare an updated Existing Rule Review Report by January 1 of each year until all District rules have been reviewed. The District is not bound to review its existing rules in accordance with the schedule set forth in an Existing Rule Review Report, but is required to complete the review of at least twenty (20%) percent of its existing rules per year until all existing rules have been reviewed in accordance with this Section. In any event, all existing rules of the District shall be reviewed by July 1, 2030.

(b) Any new rule adopted after July 1, 2025, must be reviewed in the fifth year following adoption. Such review must be completed before the day that marks the sixth year since the adoption of the rule.

(c) In conducting its rule review process, the District shall determine whether each rule:

(i) Is a valid exercise of delegated legislative authority;

(ii) Has current statutory authority;

(iii) Reiterates or paraphrases statutory material;

(iv) Is in proper form;

(v) Is consistent with expressed legislative intent pertaining to the specific provisions of law which the rule implements;

(vi) Requires a technical or substantive update to reflect current use; and

(vii) Requires updated references to statutory citations and incorporated materials.

(d) By April 1 of each year in which a rule review is being undertaken, the District shall adopt a resolution evidencing the completion of rule review and authorizing one of the following actions relative to its rule review (the "**Rule Review Resolution**"):

(i) If the District determines that no change is necessary, the District Rule Review Resolution shall include the following information:

1. A copy of the reviewed rule;

2. A written statement of its intended action; and

3. Its assessment of factors specified in Section 16(c) of this Rule.

(ii) If the District determines that one or more technical changes are necessary, the District Rule Review Resolution shall include the following information:

1. A copy of the reviewed rule and the recommended technical change or changes coded by underlining new text and striking through deleted text;

2. A written statement of its intended action;

3. Its assessment of the factors specified in Section 16(c) of this Rule; and

4. The facts and circumstances justifying the technical change or changes to the reviewed rule.

(iii) If the District determines that the rule requires a substantive change, the District shall promptly initiate rulemaking in accordance with this Rule to make all changes, including any technical changes, and the District Rule Review Resolution shall include the following information:

1. A copy of the reviewed rule;

2. The recommended change or changes coded by underlining new text and striking through deleted text;

3. A written statement of its intended action; and

4. Its assessment of factors specified in Section 16(c) of this Rule.

(iv) If the District determines that the rule should be repealed, the District shall promptly initiate the repeal the rule in accordance with this Rule, and the District Rule Review Resolution shall include the following information:

1. A written statement of its intended action; and

2. Its assessment of factors specified in subsection 16(c) of this Rule.

(e) The rule review is completed upon the District's adoption of the Rule Review Resolution and, if there is a substantive change or repeal of a rule approved the Board, the timely commencement of the rulemaking or rule repeal process set forth in this Rule. Promptly after completion of the rule review, the District shall publish a notice of the completed rule review ("**Notice of Completed Rule Review**") in a newspaper of general circulation within the county or counties in which the District is located. The Notice of Completed Rule Review shall identify the action taken by the District with respect to the reviewed rule.

(17) Rates, Fees, Rentals and Other Charges. All rates, fees, rentals, or other charges shall be subject to rulemaking proceedings.

Specific Authority: §§ 190.011(5), 190.011(15), 190.035, Fla. Stat.
Law Implemented: §§ 120.54, 120.542, 120.5435, 120.56, 120.81(2)(b), 190.011(5), 190.035(2), Fla. Stat.

Rule 3.0 Competitive Purchase.

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

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

(3) Definitions.

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

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

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

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

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

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

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

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

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

(h) "**Emergency Purchase**" means a purchase necessitated by a sudden unexpected turn of events (for example, acts of God, riot, fires, floods,

hurricanes, accidents, or any circumstances or cause beyond the control of the Board in the normal conduct of its business), where the Board finds that the delay incident to competitive purchase would be detrimental to the interests of the District. This includes, but is not limited to, instances where the time to competitively award the project will jeopardize the funding for the project, will materially increase the cost of the project, or will create an undue hardship on the public health, safety, or welfare.

(i) "**Invitation to Bid**" is a written solicitation for sealed bids with the title, date, and hour of the public bid opening designated specifically and defining the commodity or service involved. It includes printed instructions prescribing conditions for bidding, qualification, evaluation criteria, and provides for a manual signature of an authorized representative. It may include one or more bid alternates.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Rule 3.1 Procedure Under the Consultants' Competitive Negotiations Act.

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

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

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

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

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

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

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

(3) Public Announcement. Except in cases of valid public emergencies as certified by the Board, the District shall announce each occasion when Professional Services are required for a Project or a Continuing Contract by publishing a notice providing a general description of the Project, or the nature of the Continuing Contract, and the method for interested consultants to apply for consideration. The notice shall appear in at least one (1) newspaper of general circulation within the county or counties in which the District is located and in such other places as the District deems appropriate. The notice must allow at least fourteen (14) days for submittal of qualifications from the date of publication. The District may maintain lists of consultants interested in receiving such notices. These consultants are encouraged to submit annually statements of qualifications and performance data. The District shall make reasonable efforts to provide copies of any notices

to such consultants, but the failure to do so shall not give such consultants any bid protest or other rights or otherwise disqualify any otherwise valid procurement process. The Board has the right to reject any and all qualifications, and such reservation shall be included in the published notice. Consultants not receiving a contract award shall not be entitled to recover from the District any costs of qualification package preparation or submittal.

(4) Competitive Selection.

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

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

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

(iii) Each consultant's past performance;

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

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

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

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

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

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

(d) Notice of the rankings adopted by the Board, including the rejection of some or all qualification packages, shall be provided in writing to all proposers by e-mail (with a delivery and read receipt), United States Mail, hand delivery, or overnight delivery service. The District may alternatively post the notice of intent to award on its website at the conclusion of the Board meeting where the proposals were evaluated if so provided for in the Request for Qualifications. The notice shall include the following statement: "Failure to file a protest within the time prescribed in Rule 3.11 of the Rules of the District shall constitute a waiver of proceedings under those Rules," or wording to that effect. Protests of the District's ranking decisions under this Rule shall be in accordance with the procedures set forth in Rule 3.11.

(5) Competitive Negotiation.

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

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

(c) Should the District be unable to negotiate a satisfactory agreement with the firm determined to be the most qualified at a price deemed by the District to be fair, competitive, and reasonable, then negotiations with that firm shall be terminated and the District shall immediately begin negotiations with the second most qualified firm. If a satisfactory

agreement with the second firm cannot be reached, those negotiations shall be terminated and negotiations with the third most qualified firm shall be undertaken.

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

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

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

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

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

Rule 3.2 Procedure Regarding Auditor Selection.

In order to comply with the requirements of Section 218.391 of the Florida Statutes, the following procedures are outlined for selection of firms or individuals to provide Auditing Services and for the negotiation of such contracts. "**Auditing Services**" means those services within the scope of the practice of a certified public accounting firm licensed under Chapter 473 of the Florida Statutes, and qualified to conduct audits in accordance with government auditing standards as adopted by the Florida Board of Accountancy. For audits required under Chapter 190 of the Florida Statutes but not meeting the thresholds of Chapter 218 of the Florida Statutes, the District need not follow these procedures but may proceed with the selection of a firm or individual to provide Auditing Services and for the negotiation of such contracts in the manner the Board determines is in the best interests of the District.

(1) Establishment of Auditor Selection Committee. Prior to a public announcement under section (3) of this Rule that Auditing Services are required, the Board shall establish an auditor selection committee ("**Committee**"), the primary purpose of which is to assist the Board in selecting an auditor to conduct the annual financial audit required by Section 218.39 of the Florida Statutes. The Committee shall include at least three individuals, at least one of which must also be a member of the Board. The establishment and selection of the Committee must be conducted at a publicly noticed and held meeting of the Board. The Chairperson of the Committee must be a member of the Board. An employee, a chief executive officer, or a chief financial officer of the District may not serve as a member of the Committee; provided however such individual may serve the Committee in an advisory capacity.

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

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

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

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

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

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

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

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

(i) Ability of personnel;

(ii) Experience;

(iii) Ability to furnish the required services; and

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

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

(3) Public Announcement. After identifying the factors to be used in evaluating the proposals for Auditing Services as set forth in section (2) of this Rule, the Committee shall publicly announce the opportunity to provide Auditing Services. Such public announcement shall include a brief description of the audit and how interested firms can apply for consideration and obtain the RFP. The notice shall appear in at least one (1) newspaper of general circulation within the county or counties in which the District is located. The public announcement shall allow for at least seven (7) days for the submission of proposals.

(4) Request for Proposals. The Committee shall provide interested firms with a Request for Proposals ("**RFP**"). The RFP shall provide information on how proposals are to be evaluated and such other information the Committee determines is necessary for the firm to prepare a proposal. The RFP shall state the time and place for submitting proposals, which may be submitted either electronically or via hard copy as determined by the District and provided for in

the RFP. For the avoidance of doubt, the Proposals shall not be required to be publicly opened at the date, time, and place provided for in the RFP relative to the submission of Proposals.

(5) Committee's Evaluation of Proposals and Recommendation. The Committee shall meet at a publicly held meeting that is publicly noticed for a reasonable time in advance of the meeting to evaluate all qualified proposals and may, as part of the evaluation, require that each interested firm provide a public presentation where the Committee may conduct discussions with the firm, and where the firm may present information, regarding the firm's qualifications. At the public meeting, the Committee shall rank and recommend in order of preference no fewer than three firms deemed to be the most highly qualified to perform the required services after considering the factors established pursuant to subsection (2)(b) of this Rule. If fewer than three firms respond to the RFP or if no firms respond to the RFP, the Committee shall recommend such firm as it deems to be the most highly qualified. Notwithstanding the foregoing, the Committee may recommend that any and all proposals be rejected.

(6) Board Selection of Auditor.

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

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

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

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

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

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

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

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

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

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

(8) Notice of Award. Once a negotiated agreement with a firm or individual is reached, or the Board authorizes the execution of an agreement with a firm where compensation was a factor in the evaluation of proposals, notice of the intent to award, including the rejection of some or all proposals, shall be provided in writing to all proposers by e-mail (with a delivery and read receipt), United States Mail, hand delivery, or overnight delivery service. The District may alternatively post the notice of intent to award on its website at the conclusion of the Board meeting where the proposals were evaluated if so provided for in the RFP. The notice shall

include the following statement: "Failure to file a protest within the time prescribed in Rule 3.11 of the Rules of the District shall constitute a waiver of proceedings under those Rules," or wording to that effect. Protests regarding the award of contracts under this Rule shall be as provided for in Rule 3.11. No proposer shall be entitled to recover any costs of proposal preparation or submittal from the District.

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

Rule 3.3 Purchase of Insurance.

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

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

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

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

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

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

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

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

(g) Simultaneously with the review of the submitted bids, the District may undertake negotiations with those companies that have submitted reasonable and timely bids and, in the opinion of the District, are fully qualified and capable of meeting all services and requirements. Bid responses shall be evaluated in accordance with the specifications and criteria contained in the Invitation to Bid; in addition, the total cost to the District, the cost, if any, to the District officers, employees, or their

dependents, the geographic location of the company's headquarters and offices in relation to the District, and the ability of the company to guarantee premium stability may be considered. A contract to purchase insurance shall be awarded to that company whose response to the Invitation to Bid best meets the overall needs of the District, its officers, employees, and/or dependents.

(h) Notice of the intent to award, including rejection of some or all bids, shall be provided in writing to all proposers by e-mail (with a delivery and read receipt), United States Mail, hand delivery, or overnight delivery service. The District may alternatively post the notice of intent to award on its website at the conclusion of the Board meeting where the proposals were evaluated if so provided for in the Invitation to Bid. The notice shall include the following statement: "Failure to file a protest within the time prescribed in Rule 3.11 of the Rules of the District shall constitute a waiver of proceedings under those Rules," or wording to that effect. Protests of the District's procurement of insurance under this Rule shall be in accordance with the procedures set forth in Rule 3.11.

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

Rule 3.4 Pre-qualification

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

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

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

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

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

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

(e) If the District has pre-qualified vendors for a particular category of purchase, at the option of the District, only those persons who have been pre-qualified will be eligible to submit bids, proposals, replies or responses

in response to the applicable Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation.

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

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

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

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

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

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

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

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

(i) The Board shall have the right to reject all qualifications if there are not enough to be competitive or if rejection is determined to be in the best

interest of the District. No vendor shall be entitled to recover any costs of qualification preparation or submittal from the District.

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

(k) Notice of intent to pre-qualify, including rejection of some or all qualifications, shall be provided in writing to all proposers by e-mail (with a delivery and read receipt), United States Mail, hand delivery, or overnight delivery service. The District may alternatively post the notice of intent to award on its website at the conclusion of the Board meeting where the proposals were evaluated if so provided for in the Request for Qualifications. The notice shall include the following statement: "Failure to file a protest within the time prescribed in Rule 3.11 of the Rules of the District shall constitute a waiver of proceedings under those Rules," or wording to that effect. Protests of the District's pre-qualification decisions under this Rule shall be in accordance with the procedures set forth in Rule 3.11; provided however, protests related to the pre-qualification criteria and procedures for construction services shall be resolved in accordance with section (2)(b) of this Rule and Section 255.20(1)(b) of the Florida Statutes.

(2) Suspension, Revocation, or Denial of Qualification

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Examples of factors affecting the seriousness of a deficiency are:

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

(ii) Unsafe conditions allowed to exist;

(iii) Complaints from the public;

(iv) Delay or interference with the bidding process;

(v) The potential for repetition;

(vi) Integrity of the public contracting process;

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

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

Rule 3.5 Construction Contracts, Not Design-Build.

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

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

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

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

(c) The District may maintain lists of persons interested in receiving notices of Invitations to Bid, Requests for Proposals, Invitations to Negotiate, and Competitive Solicitations. The District shall make a good faith effort to provide written notice, by e-mail, United States Mail, hand delivery, or to persons who provide their name and address to the District Manager for inclusion on the list. However, failure of a person to receive the notice

shall not invalidate any contract awarded in accordance with this Rule and shall not be a basis for a protest of any contract award.

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

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

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

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

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

(iv) Meet any special pre-qualification requirements set forth in the Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation.

Any contractor that has been found guilty by a court of any violation of federal labor or employment tax laws regarding subjects including but not limited to, reemployment assistance, safety, tax withholding, worker's compensation, unemployment tax, social security and Medicare tax, wage or hour, or prevailing rate laws within the past 5 years may be considered ineligible by the District to submit a bid, response, or proposal for a District project.

Evidence of compliance with these Rules must be submitted with the bid, proposal, reply, or response, if required by the District. Failure to submit evidence of compliance when required may be grounds for rejection of the bid, proposal, reply, or response.

(f) Bids, proposals, replies, and responses, or the portions of which that include the price, shall be publicly opened at a meeting noticed in accordance with Rule 1.3, and at which at least one district representative

is present. The name of each bidder and the price submitted in the bid shall be announced at such meeting and shall be made available upon request. Minutes should be taken at the meeting and maintained by the District. Bids, proposals, replies, and responses shall be evaluated in accordance with the respective Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation and these Rules. Minor variations in the bids, proposals, replies, or responses may be waived by the Board. A variation is minor if waiver of the variation does not create a competitive advantage or disadvantage of a material nature. Mistakes in arithmetic extension of pricing may be corrected by the Board. Bids and proposals may not be modified or supplemented after opening; provided however, additional information may be requested and/or provided to evidence compliance, make non-material modifications, clarifications, or supplementations, and as otherwise permitted by Florida law.

(g) The lowest Responsive Bid submitted by a Responsive and Responsible Bidder in response to an Invitation to Bid shall be accepted. In relation to a Request for Proposals, Invitation to Negotiate, or Competitive Solicitation, the Board shall select the Responsive Proposal, Reply, or Response submitted by a Responsive and Responsible Vendor which is most advantageous to the District. To assure full understanding of the responsiveness to the solicitation requirements contained in a Request for Proposals, Invitation to Negotiate, or Competitive Solicitation, discussions may be conducted with qualified vendors. Vendors shall be accorded fair treatment prior to the submittal date with respect to any opportunity for discussion, preparation, and revision of bids, proposals, replies, and responses.

(h) The Board shall have the right to reject all bids, proposals, replies, or responses because they exceed the amount of funds budgeted for the purchase, if there are not enough to be competitive, or if rejection is determined to be in the best interest of the District. No contractor shall be entitled to recover any costs of bid, proposal, response, or reply preparation or submittal from the District.

(i) The Board may require potential contractors to furnish bid bonds, performance bonds, and/or other bonds with a responsible surety to be approved by the Board.

(j) If less than three (3) Responsive Bids, Proposals, Replies, or Responses are received, the District may purchase construction services or may reject the bids, proposals, replies, or responses for a lack of competitiveness. If no Responsive Bid, Proposal, Reply, or Response is received, the District may proceed with the procurement of construction services, in the manner the

Board determines is in the best interests of the District, which may include but is not limited to a direct purchase of the construction services without further competitive selection processes.

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

(l) Notice of intent to award, including rejection of some or all bids, proposals, replies, or responses, shall be provided in writing to all proposers by e-mail (with a delivery and read receipt), United States Mail, hand delivery, or overnight delivery service. The District may alternatively post the notice of intent to award on its website at the conclusion of the Board meeting where the proposals were evaluated if so provided for in the Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation. The notice shall include the following statement: "Failure to file a protest within the time prescribed in Rule 3.11 of the Rules of the District shall constitute a waiver of proceedings under those Rules," or wording to that effect. Protests of the District's purchase of construction services under this Rule shall be in accordance with the procedures set forth in Rule 3.11.

(3) Sole Source; Government. Construction services that are only available from a single source are exempt from this Rule. Construction services provided by governmental agencies are exempt from this Rule. This Rule shall not apply to the purchase of construction services, which may include goods, supplies, or materials, that are purchased under a federal, state, or local government contract that has been competitively procured by such federal, state, or local government in a manner consistent with the material procurement requirements of these Rules. A contract for construction services is exempt from this Rule if state or federal law prescribes with whom the District must contract or if the rate of payment is established during the appropriation process.

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

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

(6) Exceptions. This Rule is inapplicable when:

(a) The project is undertaken as repair or maintenance of an existing public facility;

(b) The funding source of the project will be diminished or lost because the time required to competitively award the project after the funds become available exceeds the time within which the funding source must be spent;

(c) The District has competitively awarded a project and the contractor has abandoned the project or the District has terminated the contract; or

(d) The District, after public notice, conducts a public meeting under Section 286.011 of the Florida Statutes, and finds by a majority vote of the Board that it is in the public's best interest to perform the project using its own services, employees, and equipment.

Specific Authority: §§ 190.011(5), 190.011(15), Fla. Stat.
Law Implemented: §§ 119.0701, 189.053, 190.033, 255.0518, 255.0525, 255.20, 287.055, Fla. Stat.

Rule 3.6 Construction Contracts, Design-Build.

(1) Scope. The District may utilize Design-Build Contracts for any public construction project for which the Board determines that use of such contract is in the best interest of the District. When letting a Design-Build Contract, the District shall use the following procedure:

(2) Procedure.

(a) The District shall utilize a Design Criteria Professional meeting the requirements of Section 287.055(2)(k) of the Florida Statutes, when developing a Design Criteria Package, evaluating the proposals and qualifications submitted by Design-Build Firms, and determining compliance of the project construction with the Design Criteria Package. The Design Criteria Professional may be an employee of the District, may be the District Engineer selected by the District pursuant to Section 287.055 of the Florida Statutes, or may be retained pursuant to Rule 3.1. The Design Criteria Professional is not eligible to render services under a Design-Build Contract executed pursuant to the Design Criteria Package.

(b) A Design Criteria Package for the construction project shall be prepared and sealed by the Design Criteria Professional. If the project utilizes existing plans, the Design Criteria Professional shall create a Design Criteria Package by supplementing the plans with project specific requirements, if any.

(c) The Board may either choose to award the Design-Build Contract pursuant to the competitive proposal selection process set forth in Section 287.055(9) of the Florida Statutes, or pursuant to the qualifications-based selection process pursuant to Rule 3.1.

(i) Qualifications-Based Selection. If the process set forth in Rule 3.1 is utilized, subsequent to competitive negotiations, a guaranteed maximum price and guaranteed completion date shall be established.

(ii) Competitive Proposal-Based Selection. If the competitive proposal selection process is utilized, the Board, in consultation with the Design Criteria Professional, shall establish the criteria, standards and procedures for the evaluation of Design-Build Proposals based on price, technical, and design aspects of the project, weighted for the project. After a Design Criteria Package and the standards and procedures for evaluation of proposals have been developed,

competitive proposals from qualified firms shall be solicited pursuant to the design criteria by the following procedure:

1. A Request for Proposals shall be advertised at least once in a newspaper of general circulation within the county in which the project is located. The notice shall allow at least twenty-one (21) days for submittal of sealed proposals, unless the Board, for good cause, determines a shorter period of time is appropriate. Any project projected to cost more than five hundred thousand dollars ($500,000) must be noticed at least thirty (30) days prior to the date for submittal of proposals.

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

3. In order to be eligible to submit a proposal, a firm must, at the time of receipt of the proposals:

    a. Hold the required applicable state professional licenses in good standing, as defined by Section 287.055(2)(h) of the Florida Statutes;

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

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

    d. Meet any special pre-qualification requirements set forth in the Request for Proposals and Design Criteria Package.

    Any contractor that has been found guilty by a court of any violation of federal labor or employment tax laws regarding

subjects including but not limited to reemployment assistance, safety, tax withholding, worker's compensation, unemployment tax, social security and Medicare tax, wage or hour, or prevailing rate laws within the past 5 years may be considered ineligible by the District to submit a bid, response, or proposal for a District project.

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

4. The proposals, or the portions of which that include the price, shall be publicly opened at a meeting noticed in accordance with Rule 1.3, and at which at least one district representative is present. The name of each bidder and the price submitted in the bid shall be announced at such meeting and shall be made available upon request. Minutes should be taken at the meeting and maintained by the District. In consultation with the Design Criteria Professional, the Board shall evaluate the proposals received based on evaluation criteria and procedures established prior to the solicitation of proposals, including but not limited to qualifications, availability, and past work of the firms and the partners and members thereof. The Board shall then select no fewer than three (3) Design-Build Firms as the most qualified.

5. The Board shall have the right to reject all proposals if the proposals are too high, or rejection is determined to be in the best interest of the District. No vendor shall be entitled to recover any costs of proposal preparation or submittal from the District.

6. If less than three (3) Responsive Proposals are received, the District may purchase design-build services or may reject the proposals for lack of competitiveness. If no Responsive Proposals are received, the District may proceed with the procurement of design-build services in the manner the Board determines is in the best interests of the District, which may include but is not limited to a direct purchase of the design-build services without further competitive selection processes.

7. Notice of the rankings adopted by the Board, including the rejection of some or all proposals, shall be provided in writing to all proposers by e-mail (with a delivery and read receipt), United States Mail, hand delivery, or overnight delivery service. The District may alternatively post the notice of intent to award on its website at the conclusion of the Board meeting where the proposals were evaluated if so provided for in the Design Criteria Package. The notice shall include the following statement: "Failure to file a protest within the time prescribed in Rule 3.11 of the Rules of the District shall constitute a waiver of proceedings under those Rules," or wording to that effect. Protests of the District's rankings under this Rule shall be in accordance with the procedures set forth in Rule 3.11.

8. The Board shall negotiate a contract with the firm ranking the highest based on the evaluation standards and shall establish a price which the Board determines is fair, competitive and reasonable. Should the Board be unable to negotiate a satisfactory contract with the firm considered to be the most qualified at a price considered by the Board to be fair, competitive, and reasonable, negotiations with that firm must be terminated. The Board shall then undertake negotiations with the second most qualified firm, based on the ranking by the evaluation standards. Should the Board be unable to negotiate a satisfactory contract with the firm considered to be the second most qualified at a price considered by the Board to be fair, competitive, and reasonable, negotiations with that firm must be terminated. The Board shall then undertake negotiations with the third most qualified firm. Should the Board be unable to negotiate a satisfactory contract with the firm considered to be the third most qualified at a price considered by the Board to be fair, competitive, and reasonable, negotiations with that firm must be terminated. Should the Board be unable to negotiate a satisfactory contract with any of the selected firms, the Board shall select additional firms in order of their rankings based on the evaluation standards and continue negotiations until an agreement is reached or the list of firms is exhausted.

9. After the Board contracts with a firm, the firm shall bring to the Board for approval, detailed working drawings of the project.

10. The Design Criteria Professional shall evaluate the compliance of the detailed working drawings and project construction with the Design Criteria Package and shall provide the Board with a report of the same.

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

(4) Emergency Purchase. The Board may, in case of public emergency, declare an emergency and immediately proceed with negotiations with the best qualified Design-Build Firm available at the time. The fact that an Emergency Purchase has occurred shall be noted in the minutes of the next Board meeting.

(5) Exceptions. This Rule is inapplicable when:

(a) The project is undertaken as repair or maintenance of an existing public facility;

(b) The funding source of the project will be diminished or lost because the time required to competitively award the project after the funds become available exceeds the time within which the funding source must be spent;

(c) The District has competitively awarded a project and the contractor has abandoned the project or the District has terminated the contractor; or

(d) The District, after public notice, conducts a public meeting under Section 286.011 of the Florida Statutes, and finds by a majority vote of the Board that it is in the public's best interest to perform the project using its own services, employees, and equipment.

Specific Authority: §§ 190.011(5), 190.011(15), Fla. Stat.
Law Implemented: §§ 119.0701, 189.053, 190.033, 255.0518, 255.0525, 255.20, 287.055, Fla. Stat.

Rule 3.7 Payment and Performance Bonds.

(1) Scope. This Rule shall apply to contracts for the construction of a public building, for the prosecution and completion of a public work, or for repairs upon a public building or public work and shall be construed in addition to terms prescribed by any other Rule that may also apply to such contracts.

(2) Required Bond. Upon entering into a contract for any of the services described in section (1) of this Rule in excess of $200,000, the Board shall require that the contractor, before commencing the work, execute and record a payment and performance bond, or other acceptable surety, in an amount equal to the contract price. Notwithstanding the terms of the contract or any other law, the District may not make payment to the contractor until the contractor has provided to the District a certified copy of the recorded bond.

(3) Discretionary Bond. At the discretion of the Board, upon entering into a contract for any of the services described in section (1) of this Rule for an amount not exceeding $200,000, the contractor may be exempted from executing a payment and performance bond.

Specific Authority: §§ 190.011(5), 190.011(15), Fla. Stat.
Law Implemented: § 255.05, Fla. Stat.

Rule 3.8 Goods, Supplies, and Materials.

(1) Purpose and Scope. All purchases of goods, supplies, or materials exceeding the amount provided in Section 287.017 of the Florida Statutes, for CATEGORY FOUR, shall be purchased under the terms of this Rule. Contracts for purchases of "**goods, supplies, and materials**" do not include printing, insurance, advertising, or legal notices. A contract involving goods, supplies, or materials plus maintenance services may, in the discretion of the Board, be treated as a contract for maintenance services. However, a purchase shall not be divided solely in order to avoid the threshold bidding requirements.

(2) Procedure. When a purchase of goods, supplies, or materials is within the scope of this Rule, the following procedures shall apply:

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

(b) Notice of the Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation shall be advertised at least once in a newspaper of general circulation within the District and within the county or counties in which the District is located. The notice shall also include the amount of the bid bond, if one is required. The notice shall allow at least seven (7) days for submittal of bids, proposals, replies, or responses.

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

(d) If the District has pre-qualified suppliers of goods, supplies, and materials, then, at the option of the District, only those persons who have been pre-qualified will be eligible to submit bids, proposals, replies, or responses.

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

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

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

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

(iv) Meet any special pre-qualification requirements set forth in the Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation.

Evidence of compliance with these Rules must be submitted with the bid, proposal, reply or response if required by the District. Failure to submit evidence of compliance when required may be grounds for rejection of the bid, proposal, reply, or response.

Any firm or individual whose principal place of business is outside the State of Florida must also submit a written opinion of an attorney at law licensed to practice law in that foreign state, as to the preferences, if any or none, granted by the law of that foreign state to business entities whose principal places of business are in that foreign state, in the letting of any or all public contracts. Failure to submit such a written opinion or submission of a false or misleading written opinion may be grounds for rejection of the bid, proposal, reply, or response.

(f) Bids, proposals, replies, and responses shall be publicly opened at the time and place noted on the Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation. Bids, proposals, replies, and responses shall be evaluated in accordance with the respective Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation, and this Rule. Minor variations in the bids, proposals, replies, or responses may be waived by the Board. A variation is minor if waiver of the variation does not create a competitive advantage or disadvantage of a material nature. Mistakes in arithmetic extension of pricing may be corrected by the Board. Bids and proposals may not be modified or supplemented after opening; provided however, additional information may be requested and/or provided to evidence compliance, make non-material modifications, clarifications, or supplementations, and as otherwise permitted by Florida law.

(g) The lowest Responsive Bid, after taking into account the preferences provided for in this subsection, submitted by a Responsive and Responsible Bidder in response to an Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation shall be accepted. If the lowest Responsive Bid is submitted by a Responsive and Responsible Bidder

whose principal place of business is located in a foreign state which does not grant a preference in competitive purchase to businesses whose principal place of business are in that foreign state, the lowest Responsible and Responsive Bidder whose principal place of business is in the State of Florida shall be awarded a preference of five (5) percent. If the lowest Responsive Bid is submitted by a Responsive and Responsible Bidder whose principal place of business is located in a foreign state which grants a preference in competitive purchase to businesses whose principal place of business are in that foreign state, the lowest Responsible and Responsive Bidder whose principal place of business is in the State of Florida shall be awarded a preference equal to the preference granted by such foreign state.

To assure full understanding of the responsiveness to the solicitation requirements contained in an Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation, discussions may be conducted with qualified vendors. Vendors shall be accorded fair treatment prior to the submittal date with respect to any opportunity for discussion, preparation, and revision of bids, proposals, replies, and responses.

(h) The Board shall have the right to reject all bids, proposals, replies, or responses because they exceed the amount of funds budgeted for the purchase, if there are not enough to be competitive, or if rejection is determined to be in the best interest of the District. No vendor shall be entitled to recover any costs of bid, proposal, reply, or response preparation or submittal from the District.

(i) The Board may require bidders and proposers to furnish bid bonds, performance bonds, and/or other bonds with a responsible surety to be approved by the Board.

(j) Notice of intent to award, including rejection of some or all bids, proposals, replies, or responses shall be provided in writing to all proposers by e-mail (with a delivery and read receipt), United States Mail, hand delivery, or overnight delivery service. The District may alternatively post the notice of intent to award on its website at the conclusion of the Board meeting where the proposals were evaluated if so provided for in the Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation. The notice shall include the following statement: "Failure to file a protest within the time prescribed in Rule 3.11 of the Rules of the District shall constitute a waiver of proceedings under those Rules," or wording to that effect. Protests of the District's purchase of goods,

supplies, and materials under this Rule shall be in accordance with the procedures set forth in Rule 3.11.

(k) If less than three (3) Responsive Bids, Proposals, Replies, or Responses are received, the District may purchase goods, supplies, or materials, or may reject the bids, proposals, replies, or responses for a lack of competitiveness. If no Responsive Bid, Proposal, Reply, or Response is received, the District may proceed with the procurement of goods, supplies, and materials, in the manner the Board determines is in the best interests of the District, which may include but is not limited to a direct purchase of the goods, supplies, and materials without further competitive selection processes.

(3) Goods, Supplies, and Materials included in a Construction Contract Awarded Pursuant to Rule 3.5 or 3.6. There may be occasions where the District has undergone the competitive purchase of construction services which contract may include the provision of goods, supplies, or materials. In that instance, the District may approve a change order to the contract and directly purchase the goods, supplies, and materials. Such purchase of goods, supplies, and materials deducted from a competitively purchased construction contract shall be exempt from this Rule.

(4) Exemption. Goods, supplies, and materials that are only available from a single source are exempt from this Rule. Goods, supplies, and materials provided by governmental agencies are exempt from this Rule. A contract for goods, supplies, or materials is exempt from this Rule if state or federal law prescribes with whom the District must contract or if the rate of payment is established during the appropriation process. This Rule shall not apply to the purchase of goods, supplies or materials that are purchased under a federal, state, or local government contract that has been competitively procured by such federal, state, or local government in a manner consistent with the material procurement requirements of these Rules.

(5) Renewal. Contracts for the purchase of goods, supplies, and/or materials subject to this Rule may be renewed for a maximum period of five (5) years.

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

Specific Authority: §§ 190.011(5), 190.011(15), Fla. Stat.
Law Implemented: §§ 189.053, 190.033, 287.017, 287.084, Fla. Stat.

Rule 3.9 Maintenance Services.

(1) Scope. All contracts for maintenance of any District facility or project shall be set under the terms of this Rule if the cost exceeds the amount provided in Section 287.017 of the Florida Statutes, for CATEGORY FOUR. A contract involving goods, supplies, and materials plus maintenance services may, in the discretion of the Board, be treated as a contract for maintenance services. However, a purchase shall not be divided solely in order to avoid the threshold bidding requirements.

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

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

(b) Notice of the Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation shall be advertised at least once in a newspaper of general circulation within the county or counties in which the District is located. The notice shall also include the amount of the bid bond, if one is required. The notice shall allow at least seven (7) days for submittal of bids, proposals, replies, or responses.

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

(d) If the District has pre-qualified suppliers of maintenance services, then, at the option of the District, only those persons who have been pre-qualified will be eligible to submit bids, proposals, replies, and responses.

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

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

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

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

(iv) Meet any special pre-qualification requirements set forth in the Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation.

Evidence of compliance with these Rules must be submitted with the bid, proposal, reply, or response if required by the District. Failure to submit evidence of compliance when required may be grounds for rejection of the bid, proposal, reply, or response.

(f) Bids, proposals, replies, and responses shall be publicly opened at the time and place noted on the Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation. Bids, proposals, replies, and responses shall be evaluated in accordance with the respective Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation, and these Rules. Minor variations in the bids, proposals, replies, and responses may be waived by the Board. A variation is minor if waiver of the variation does not create a competitive advantage or disadvantage of a material nature. Mistakes in arithmetic extension of pricing may be corrected by the Board. Bids and proposals may not be modified or supplemented after opening; provided however, additional information may be requested and/or provided to evidence compliance, make non-material modifications, clarifications, or supplementations, and as otherwise permitted by Florida law.

(g) The lowest Responsive Bid submitted in response to an Invitation to Bid by a Responsive and Responsible Bidder shall be accepted. In relation to a Request for Proposals, Invitation to Negotiate or Competitive Solicitation the Board shall select the Responsive Proposal, Reply, or Response submitted by a Responsive and Responsible Vendor which is most advantageous to the District. To assure full understanding of the responsiveness to the solicitation requirements contained in a Request for Proposals, Invitation to Negotiate, or Competitive Solicitation, discussions may be conducted with qualified vendors. Vendors shall be accorded fair treatment prior to the submittal date with respect to any opportunity for discussion, preparation, and revision of bids, proposals, replies, or responses.

(h) The Board shall have the right to reject all bids, proposals, replies, or responses because they exceed the amount of funds budgeted for the purchase, if there are not enough to be competitive, or if rejection is

determined to be in the best interest of the District. No Vendor shall be entitled to recover any costs of bid, proposal, reply, or response preparation or submittal from the District.

(i) The Board may require bidders and proposers to furnish bid bonds, performance bonds, and/or other bonds with a responsible surety to be approved by the Board.

(j) Notice of intent to award, including rejection of some or all bids, proposals, replies, or responses shall be provided in writing to all proposers by e-mail (with a delivery and read receipt), United States Mail, hand delivery, or overnight delivery service. The District may alternatively post the notice of intent to award on its website at the conclusion of the Board meeting where the proposals were evaluated if so provided for in the Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation. The notice shall include the following statement: "Failure to file a protest within the time prescribed in Rule 3.11 of the Rules of the District shall constitute a waiver of proceedings under those Rules," or wording to that effect. Protests of the District's procurement of maintenance services under this Rule shall be in accordance with the procedures set forth in Rule 3.11.

(k) If less than three (3) Responsive Bids, Proposals, Replies, or Responses are received, the District may purchase the maintenance services or may reject the bids, proposals, replies, or responses for a lack of competitiveness. If no Responsive Bid, Proposal, Reply, or Response is received, the District may proceed with the procurement of maintenance services, in the manner the Board determines is in the best interests of the District, which may include but is not limited to a direct purchase of the maintenance services without further competitive selection processes.

(3) Exemptions. Maintenance services that are only available from a single source are exempt from this Rule. Maintenance services provided by governmental agencies are exempt from this Rule. A contract for maintenance services is exempt from this Rule if state or federal law prescribes with whom the District must contract or if the rate of payment is established during the appropriation process.

(4) Renewal. Contracts for the purchase of maintenance services subject to this Rule may be renewed for a maximum period of five (5) years.

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

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

Specific Authority: §§ 190.011(5), 190.011(15), 190.033, Fla. Stat.
Law Implemented: §§ 119.0701, 190.033, 287.017, Fla. Stat.

Rule 3.10 Contractual Services.

(1) Exemption from Competitive Purchase. Pursuant to Section 190.033(3) of the Florida Statutes, Contractual Services shall not be subject to competitive purchasing requirements. If an agreement is predominantly for Contractual Services, but also includes maintenance services or the purchase of goods and services, the contract shall not be subject to competitive purchasing requirements. Regardless of whether an advertisement or solicitation for Contractual Services is identified as an Invitation to Bid, Request for Proposals, Invitation to Negotiate, or Competitive Solicitation, no rights or remedies under these Rules, including but not limited to protest rights, are conferred on persons, firms, or vendors proposing to provide Contractual Services to the District.

(2) Contracts; Public Records. In accordance with Florida law, each contract for Contractual Services shall include provisions required by law that require the contractor to comply with public records laws.

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

Rule 3.11 Protests with Respect to Proceedings under Rules 3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.8, and 3.9.

The resolution of any protests with respect to proceedings under Rules 3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.8, and 3.9 shall be in accordance with this Rule.

(1) Filing.

(a) With respect to a protest regarding qualifications, specifications, documentation, or other requirements contained in a Request for Qualifications, Request for Proposals, Invitation to Bid, or Competitive Solicitation issued by the District, the notice of protest shall be filed in writing within seventy-two (72) calendar hours (excluding Saturdays, Sundays, and state holidays) after the first advertisement of the Request for Qualifications, Request for Proposals, Invitation to Bid, or Competitive Solicitation. A formal protest setting forth with particularity the facts and law upon which the protest is based shall be filed within seven (7) calendar days (including Saturdays, Sundays, and state holidays) after the initial notice of protest was filed. For purposes of this Rule, wherever applicable, filing will be perfected and deemed to have occurred upon receipt by the District. Failure to file a notice of protest shall constitute a waiver of all rights to protest the District's intended decision. Failure to file a formal written protest shall constitute an abandonment of the protest proceedings and shall automatically terminate the protest proceedings.

(b) Except for those situations covered by subsection (1)(a) of this Rule, any firm or person who is affected adversely by a District's ranking or intended award under Rules 3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.8, or 3.9 and desires to contest the District's ranking or intended award, shall file with the District a written notice of protest within seventy-two (72) calendar hours (excluding Saturdays, Sundays, and state holidays) after receipt of the notice of the District's ranking or intended award or after posting on the District's website if so provided for in the Request for Qualifications, Request for Proposals, Invitation to Bid, or Competitive Solicitation. A formal protest setting forth with particularity the facts and law upon which the protest is based shall be filed within seven (7) calendar days (including Saturdays, Sundays, and state holidays) after the initial notice of protest was filed. For purposes of this Rule, wherever applicable, filing will be perfected and deemed to have occurred upon receipt by the District. Failure to file a notice of protest shall constitute a waiver of all rights to protest the District's ranking or intended award. Failure to file a formal written protest shall constitute an abandonment of the protest proceedings and shall automatically terminate the protest proceedings.

(c) If the requirement for the posting of a protest bond and the amount of the protest bond, which may be expressed by a percentage of the contract to be awarded or a set amount, is disclosed in the District's competitive solicitation documents for a particular purchase under Rules 3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.8, or 3.9, any person who files a notice of protest must post the protest bond. The amount and form of the protest bond shall be determined by District staff after consultation with the Board and within the limits, if any, imposed by Florida law. In the event the protest is successful, the protest bond shall be refunded to the protestor. In the event the protest is unsuccessful, the protest bond shall be applied towards the District's costs, expenses, and attorney's fees associated with hearing and defending the protest. In the event the protest is settled by mutual agreement of the parties, the protest bond shall be distributed as agreed to by the District and protestor.

(d) The District does not accept documents filed by e-mail or facsimile transmission. Filings are only accepted during normal business hours.

(2) Contract Execution. Upon receipt of a notice of protest which has been timely filed, the District shall not execute the contract under protest until the subject of the protest is resolved. However, if the District sets forth in writing particular facts and circumstances showing that delay incident to protest proceedings will jeopardize the funding for the project, will materially increase the cost of the project, or will create an immediate and serious danger to the public health, safety, or welfare, the contract may be executed.

(3) Informal Proceeding. If the Board determines a protest does not involve a disputed issue of material fact, the Board may, but is not obligated to, schedule an informal proceeding to consider the protest. Such informal proceeding shall be at a time and place determined by the Board. Notice of such proceeding shall be sent via e-mail (with a delivery and read receipt), United States Mail, or hand delivery to the protestor and any substantially affected persons or parties not less than three (3) calendar days prior to such informal proceeding. Within thirty (30) calendar days following the informal proceeding, the Board shall issue a written decision setting forth the factual, legal, and policy grounds for its decision.

(4) Formal Proceeding. If the Board determines a protest involves disputed issues of material fact or if the Board elects not to use the informal proceeding process provided for in section (3) of this Rule, the District shall schedule a formal hearing to resolve the protest. The Chairperson shall designate any member of the Board (including the Chairperson), District Manager, District Counsel, or other person as a hearing officer to conduct the hearing. The hearing officer may:

(a) Administer oaths and affirmations;

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

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

(d) Enter orders; and

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

The hearing officer shall, within thirty (30) days after the hearing or receipt of the hearing transcript, whichever is later, file a recommended order which shall include a caption, time and place of hearing, appearances entered at the hearing, statement of the issues, findings of fact and conclusions of law, separately stated, and a recommendation for final District action. The District shall allow each party fifteen (15) days in which to submit written exceptions to the recommended order. The District shall issue a final order within sixty (60) days after the filing of the recommended order.

(5) Rejection of all Qualifications, Bids, Proposals, Replies and Responses after Receipt of Notice of Protest. If the Board determines there was a violation of law, defect, or an irregularity in the competitive solicitation process, the Bids, Proposals, Replies, and Responses are too high, or if the Board determines it is otherwise in the District's best interest, the Board may reject all qualifications, bids, proposals, replies, and responses and start the competitive solicitation process anew. If the Board decides to reject all qualifications, bids, proposals, replies, and responses and start the competitive solicitation process anew, any pending protests shall automatically terminate.

(6) Judicial Review. A party who is adversely affected by final District action is entitled to judicial review. Judicial review shall be sought in the county where the District is located. All proceedings shall be instituted by filing a notice of appeal or petition for review in accordance with the Florida Rules of Appellate Procedure within thirty (30) calendar days after the rendition of the decision being appealed. The filing of an appeal does not itself stay enforcement of the final District decision. Judicial review of any District action shall be confined to the record transmitted. The record for judicial review shall be compiled in accordance with the Florida Rules of Appellate Procedure. Failure to file a notice of appeal or petition for review within the time prescribed herein shall constitute a waiver of judicial review proceedings.

(7) Intervenors. Other substantially affected persons may join the proceedings as intervenors on appropriate terms which shall not unduly delay the proceedings.

(8) Settlement. Nothing herein shall preclude the settlement of any protest under this Rule at any time.

Specific Authority: §§ 190.011(5), 190.011(15), Fla. Stat.
Law Implemented: §§ 120.69(2)(a), 190.033, Fla. Stat.

Rule 4.0 Effective Date.

These Rules shall be effective March 30, 2026, except that no election of officers required by these Rules shall be required until after the next regular election for the Board.

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

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

6

Global Corporate Trust Services
500 West Cypress Creek Road
Suite 460
Fort Lauderdale, Florida 33309

January 27th, 2025

The Groves of St. Lucie County CDD
c/o Craig Wrathell
Wrathell, Hunt & Associates
2300 Glades Road, Suite 410W
Boca Raton, FL 33431

Re: The Groves of St. Lucie County Community Development District, Series 2025

We are pleased to offer the following fee structure for the above referenced issue:

Acceptance Fee	$2,400.00
Closing Expenses	$600.00 (Est., Florida Closing)
Annual Trustee, Paying Agent, Registrar and Transfer Agent Fee *(Calculated at 0.03% of Bonds Outstanding, Min of $3,750 and Max of $7,500)*	$4,350.00
Ongoing Out-of-Pocket Expenses	7.50% of Annual Fees
Trustee Counsel Fee	$6,250.00
Total Due at Closing:	$13,600.00

This proposal and the fees detailed herein are subject in all aspects to U.S. Bank's review and acceptance of the final financing documents which set forth our duties and responsibilities. Any unexpected or extraordinary services, duties and/or responsibilities will be reasonably billed in addition to the amounts identified herein. Extraordinary services are responses to requests, inquiries or developments, or the carrying out of duties or responsibilities of an unusual nature, including termination, which may or may not be provided for in the governing documents, and are not routine or undertaken in the ordinary course of business. Payment of fees for extraordinary services is appropriate where particular requests, inquiries or developments are unexpected, even if the possibility of such things could have been foreseen at the inception of the transaction. This would include but is not limited to document amendments and substitutions, mandatory tenders, optional redemptions, UCC filings, investment agreements, outside held money market funds, default administration, travel expense (if any outside the city), etc. At our option, these charges will be billed at a flat fee or at our hourly rate then in effect. Fees are subject to change at our discretion and upon written notice. Fees paid in advance will not be prorated. Finalization of the transaction and payment of the fees set forth herein constitutes agreement to the above fee schedule, including agreement to any subsequent changes upon proper written notice. In the event this transaction is not finalized, any related out-of-pocket expenses may be billed to you directly.

The above fees and expenses would be paid in advance. Thank you for the opportunity to continue to provide our services to the District. Please do not hesitate to contact me at 954.938.2475 if you have any questions or if you need any additional information.

Sincerely,

Amanda Kumar

Amanda Kumar, Vice President

IMPORTANT INFORMATION ABOUT PROCEDURES FOR OPENING A NEW ACCOUNT:
To help the government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify and record information that identifies each person who opens an account. For a non-individual person such as a business entity, a charity, a Trust or other legal entity we will ask for documentation to verify its formation and existence as a legal entity. We may also ask to see financial statements, licenses, identification and authorization documents from individuals claiming authority to represent the entity or other relevant documentation.

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

8

RESOLUTION 2026-09

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

WHEREAS, The Groves of St. Lucie County Community Development District ("**District**") is a local unit of special-purpose government created and existing pursuant to Chapter 190, *Florida Statutes*; and

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

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

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

NOW THEREFORE BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT:

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

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

PASSED AND ADOPTED this 30th day of March, 2026.

ATTEST**:**

THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT

_____
Secretary/Assistant Secretary

_____
Chair/Vice Chair, Board of Supervisors

EXHIBIT "A"

THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT		
BOARD OF SUPERVISORS FISCAL YEAR 2025/2026 MEETING SCHEDULE		
LOCATION *TBD*		
DATE	**POTENTIAL DISCUSSION/FOCUS**	**TIME**
April __, 2026	**Regular Meeting**	**___:___ AM/PM**
May __, 2026	**Regular Meeting**	**___:___ AM/PM**
June __, 2026	**Regular Meeting**	**___:___ AM/PM**
July __, 2026	**Regular Meeting**	**___:___ AM/PM**
August __, 2026	**Regular Meeting**	**___:___ AM/PM**
September __, 2026	**Regular Meeting**	**___:___ AM/PM**

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

9

RESOLUTION 2026-15

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT DESIGNATING DATES, TIMES AND LOCATIONS FOR REGULAR MEETINGS OF THE BOARD OF SUPERVISORS OF THE DISTRICT FOR THE FISCAL YEAR 2026/2027 AND PROVIDING FOR AN EFFECTIVE DATE

WHEREAS, The Groves of St. Lucie County Community Development District ("**District**") is a local unit of special-purpose government created and existing pursuant to Chapter 190, *Florida Statutes*; and

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

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

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

NOW THEREFORE BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT:

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

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

PASSED AND ADOPTED this 30th day of March, 2026.

ATTEST**:**

THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT

_____
Secretary/Assistant Secretary

_____
Chair/Vice Chair, Board of Supervisors

EXHIBIT "A"

THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT		
BOARD OF SUPERVISORS FISCAL YEAR 2026/2027 MEETING SCHEDULE		
LOCATION *TBD*		
DATE	**POTENTIAL DISCUSSION/FOCUS**	**TIME**
October __, 2026	**Regular Meeting**	**___:___ AM/PM**
November __, 2026	**Regular Meeting**	**___:___ AM/PM**
December __, 2026	**Regular Meeting**	**___:___ AM/PM**
January __, 2027	**Regular Meeting**	**___:___ AM/PM**
February __, 2027	**Regular Meeting**	**___:___ AM/PM**
March __, 2027	**Regular Meeting**	**___:___ AM/PM**
April __, 2027	**Regular Meeting**	**___:___ AM/PM**
May __, 2027	**Regular Meeting**	**___:___ AM/PM**
June __, 2027	**Regular Meeting**	**___:___ AM/PM**
July __, 2027	**Regular Meeting**	**___:___ AM/PM**
August __, 2027	**Regular Meeting**	**___:___ AM/PM**
September __, 2027	**Regular Meeting**	**___:___ AM/PM**

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

11

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

11A

USA TODAY CO.

LocaliQ

PO Box 631244 Cincinnati, OH 45263-1244

AFFIDAVIT OF PUBLICATION

Daphne Gillyard
The Groves of St Lucie County CDD
2300 Glades RD
Suite 410W
Boca Raton FL 33431-7386

STATE OF WISCONSIN, COUNTY OF BROWN

Before the undersigned authority personally appeared, who on oath says that he or she is the Legal Advertising Representative of the Indian River Press Journal/St Lucie News Tribune/Stuart News, newspapers published in Indian River/St Lucie/Martin Counties, Florida; that the attached copy of advertisement, being a Legal Ad in the matter of Bids & Proposals, was published on the publicly accessible websites of Indian River/St Lucie/Martin Counties, Florida, or in a newspaper by print in the issues of, on:

SCN StLucie-IndianRv-Stuart 02/10/2026
SCN tcpalm.com 02/10/2026

Affiant further says that the website or newspaper complies with all legal requirements for publication in chapter 50, Florida Statutes.
Subscribed and sworn to before me, by the legal clerk, who is personally known to me, on 02/10/2026

Legal Clerk

Notary, State of WI, County of Brown

9-3-29

My commission expires

Publication Cost:	$131.36	
Tax Amount:	$0.00	
Payment Cost:	$131.36	
Order No:	12069590	# of Copies:
Customer No:	1499243	1
PO #:		

THIS IS NOT AN INVOICE!

Please do not use this form for payment remittance.

KONGMENG YANG
Notary Public
State of Wisconsin

THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT REQUEST FOR PROPOSALS FOR ANNUAL AUDIT SERVICES

The Groves of St. Lucie County Community Development District hereby requests proposals for annual financial auditing services. The proposal must provide for the auditing of the District's financial records for the fiscal year ending September 30, 2025, with an option for additional annual renewals, subject to mutual agreement by both parties. The District is a local unit of special-purpose government created under Chapter 190, Florida Statutes, for the purpose of financing, constructing, and maintaining public infrastructure. The District is located in St. Lucie County, Florida. The final contract will require that, among other things, the audit for the fiscal year ending September 30, 2025, be completed no later than June 30, 2026.

The auditing entity submitting a proposal must be duly licensed under Chapter 473, Florida Statutes, and be qualified to conduct audits in accordance with "Government Auditing Standards," as adopted by the Florida Board of Accountancy. Audits shall be conducted in accordance with Florida Law and particularly Section 218.39, Florida Statutes, and the rules of the Florida Auditor General.

Proposal packages, which include evaluation criteria and instructions to proposers, are available from the District Manager at the address and telephone number listed below.

Proposers must provide one (1) electronic and one (1) unbound copy of their proposal to the offices of the District Manager, located at 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431, ph: (877) 276-0889 ("District Manager"), in an envelope marked on the outside "Auditing Services, The Groves of St. Lucie County Community Development District." Proposals must be received by 12:00 p.m. on February 18, 2026, at the office of the District Manager. Please direct all questions regarding this Notice to the District Manager.

District Manager
Pub: January 10, 2026
TCN12069590

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

11B

THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS FOR ANNUAL AUDIT SERVICES

The Groves of St. Lucie County Community Development District hereby requests proposals for annual financial auditing services. The proposal must provide for the auditing of the District's financial records for the fiscal year ending September 30, 2025, with an option for additional annual renewals, subject to mutual agreement by both parties. The District is a local unit of special-purpose government created under Chapter 190, *Florida Statutes*, for the purpose of financing, constructing, and maintaining public infrastructure. The District is located in St. Lucie County, Florida. The final contract will require that, among other things, the audit for the fiscal year ending September 30, 2025, be completed no later than June 30, 2026.

The auditing entity submitting a proposal must be duly licensed under Chapter 473, *Florida Statutes*, and be qualified to conduct audits in accordance with "Government Auditing Standards," as adopted by the Florida Board of Accountancy. Audits shall be conducted in accordance with Florida Law and particularly Section 218.39, *Florida Statutes*, and the rules of the Florida Auditor General.

Proposal packages, which include evaluation criteria and instructions to proposers, are available from the District Manager at the address and telephone number listed below.

Proposers must provide one (1) electronic and one (1) unbound copy of their proposal to the offices of the District Manager, located at 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431, ph: (877) 276-0889 ("District Manager"), in an envelope marked on the outside "Auditing Services, The Groves of St. Lucie County Community Development District." Proposals must be received by 12:00 p.m. on February 18, 2026, at the office of the District Manager. Please direct all questions regarding this Notice to the District Manager.

District Manager

THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT

REQUEST FOR PROPOSALS

District Auditing Services for Fiscal Year 2025
St. Lucie County, Florida

INSTRUCTIONS TO PROPOSERS

SECTION 1. DUE DATE. Sealed proposals must be received no later than February 18, 2026 at 12:00 p.m., at the offices of District Manager, located at Wrathell, Hunt and Associates, LLC, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431. Proposals will be publicly opened at that time.

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

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

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

SECTION 5. SUBMISSION OF PROPOSAL. Submit one (1) electronic and one (1) unbound copy of the Proposal Documents, and other requested attachments at the time and place indicated herein, which shall be enclosed in an opaque sealed envelope, marked with the title "Auditing Services – The Groves of St. Lucie County Community Development District" on the face of it. **Please include pricing for each additional bond issuance.**

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

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

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

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

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

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

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

A. List the position or title of all personnel to perform work on the District audit. Include resumes for each person listed; list years of experience in present position for each party listed and years of related experience.

B. Describe proposed staffing levels, including resumes with applicable certifications.

C. Three references from projects of similar size and scope. The Proposer should include information relating to the work it conducted for each reference as well as a name, address and phone number of a contact person.

D. The lump sum cost of the provision of the services under the proposal, plus the lump sum cost of four (4) annual renewals.

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

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

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

THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT
AUDITOR SELECTION
EVALUATION CRITERIA

1. Ability of Personnel. **(20 Points)**

(E.g., geographic location of the firm's headquarters or permanent office in relation to the project; capabilities and experience of key personnel; present ability to manage this project; evaluation of existing work load; proposed staffing levels, etc.)

2. Proposer's Experience. **(20 Points)**

(E.g. past record and experience of the Proposer in similar projects; volume of work previously performed by the firm; past performance for other or current Community Development District(s) in other contracts; character, integrity, reputation of Proposer, etc.)

3. *Understanding of Scope of Work.* **(20 Points)**

Extent to which the proposal demonstrates an understanding of the District's needs for the services requested.

4. Ability to Furnish the Required Services. **(20 Points)**

Extent to which the proposal demonstrates the adequacy of Proposer's financial resources and stability as a business entity necessary to complete the services required.

5. Price. **(20 Points)*****

Points will be awarded based upon the lowest total proposal for rendering the services and the reasonableness of the proposal.

Total **(100 Points)**

***Alternatively, the Board may choose to evaluate firms without considering price, in which case the remaining categories would be assigned 25 points each.

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

11C

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

11CI

THE GROVES OF ST. LUCIE COUNTY
COMMUNITY DEVELOPMENT DISTRICT

PROPOSAL FOR AUDIT SERVICES

PROPOSED BY:

Berger, Toombs, Elam, Gaines & Frank

CERTIFIED PUBLIC ACCOUNTANTS, PL

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600 Citrus Avenue, Suite 200
Fort Pierce, Florida 34950

(772) 461-6120

CONTACT PERSON:

Maritza Stonebraker, CPA, Director

DATE OF PROPOSAL:

February 18, 2026

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Berger, Toombs, Elam,
Gaines & Frank

Certified Public Accountants PL

600 Citrus Avenue
Suite 200
Fort Pierce, Florida 34950

772/461-6120 // 461-1155
FAX: 772/468-9278

February 18, 2026

The Groves of St. Lucie County Community Development District
Wrathell, Hunt and Associates, LLC
2300 Glades Road, Suite 410W
Boca Raton, FL 33431

Dear District Manager:

Thank you very much for the opportunity to present our professional credentials to provide audit services for The Groves of St. Lucie County Community Development District.

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

Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL is a recognized leader in providing services to governmental and nonprofit agencies throughout Florida. We have been the independent auditors for a number of local governmental agencies and through our experience in performing their audits, we have been able to increase our audit efficiency and; therefore, reduce costs. We have continually passed this cost savings on to our clients and will continue to do so in the future. As a result of our experience and expertise, we have developed an effective and efficient audit approach designed to meet or exceed the performance specifications in accordance with auditing standards generally accepted in the United States of America, the standards applicable to financial audits contained in Government Auditing Standards, issued by the Comptroller General of the United States, and the standards for financial and compliance audits.

We will conduct the audit in accordance with auditing standards generally accepted in the United States of America with minimal disruption to your operations. Our firm has frequent technical updates to keep our personnel informed and up-to-date on all changes that are occurring within the industry.

Berger, Toombs, Elam,
Gaines & Frank
Certified Public Accountants PL

The Groves of St. Lucie County Community Development District
February 18, 2026

Our firm is a member of the Government Audit Quality Center, an organization dedicated to improving government audit quality. We also utilize the audit program software of a nationally recognized CPA firm to assure us that we are up to date with all auditing standards and to assist us maintain maximum audit efficiencies.

To facilitate your evaluation of our qualifications and experience, we have arranged this proposal to include a resume of our firm, including our available staff, our extensive prior governmental and nonprofit auditing experience and clients to be contacted.

You need a firm that will provide an efficient, cost-effective, high-quality audit within critical time constraints. You need a firm with the prerequisite governmental and nonprofit experience to perform your audit according to stringent legal and regulatory requirements, a firm that understands the complex nature of community development districts and their unique compliance requirements. You need a firm with recognized governmental and nonprofit specialists within the finance and governmental communities. And, certainly, you need a firm that will provide you with valuable feedback to enhance your current and future operations. Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL is that firm. Maritza Stonebraker is the person authorized to make representations for the firm.

Thank you again for the opportunity to submit this proposal to The Groves of St. Lucie County Community Development District.

Very truly yours,

Berger Toombs Elam Gaines & Frank

Berger, Toombs, Elam, Gaines & Frank
Certified Public Accountants PL
Fort Pierce, Florida

PROFILE OF THE PROPOSER

Description and History of Audit Firm

Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL is a Treasure Coast public accounting firm, which qualifies as a small business firm, as established by the Small Business Administration (13 CFR 121.38), with offices in Fort Pierce and Stuart. We are a member of the Florida Institute of Certified Public Accountants and the American Institute of Certified Public Accountants. The firm was formed from the merger of Edwards, Berger, Harris & Company (originated in 1972) and McAlpin, Curtis & Associates (originated in 1949). J. W. Gaines and Associates (originated in 1979) merged with the firm in 2004. Our tremendous growth rate experienced over the last 70 years is directly attributable to the firm's unrelenting dedication to providing the highest quality, responsive professional services attainable to its clients.

We are a member of the Private Companies Practice Section (PCPS) of the American Institute of Certified Public Accountants (AICPA) to assure we meet the highest standards. Membership in this practice section requires that our firm meet more stringent standards than standard AICPA membership. These rigorous requirements include the requirement of a triennial peer review of our firm's auditing and accounting practice and annual Continuing Professional Education (CPE) for all accounting staff (whether CPA or non-CPA). For standard AICPA membership, only a quality review is required and only CPAs must meet CPE requirements.

We are also a member of the Government Audit Quality Center ("the Center") of the American Institute of Certified Public Accountants to assure the quality of our government audits. Membership in the Center, which is voluntary, requires our firm to comply with additional standards to promote the quality of government audits.

We have been extensively involved in serving local government entities with professional accounting, auditing and consulting services throughout the entire history of our firm. Our substantial experience over the years makes us uniquely qualified to provide accounting, auditing, and consulting services to these clients. We are a recognized leader in providing services to governmental and nonprofit agencies on the Treasure Coast and in Central and South Florida, with extensive experience in auditing community development districts and water control districts. We were the independent auditors of the City of Fort Pierce for over 37 years and for St. Lucie County for over 34 years. Additionally, we have performed audits of the City of Stuart, the City of Vero Beach, Indian River County and Martin County. We also presently audit over 100 Community Development Districts throughout Florida.

Our firm was founded on the belief that we are better able to respond to our clients needs through education, experience, independence, quality control, and personal service. Our firm's commitment to quality is reflected in our endeavor of professional excellence via continuing education, the use of the latest computer technology, professional membership in PCPS and peer review.

We believe our approach to audit engagements, intelligence and innovation teamed with sound professional judgment enables us to explore new concepts while remaining sensitive to the fundamental need for practical solutions. We take pride in giving you the assurance that the personal assistance you receive comes from years of advanced training, technical experience and financial acumen.

Professional Staff Resources

Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL has a total of 32 professional and administrative staff (including 12 professional staff with extensive experience servicing government entities). The work will be performed out of our Fort Pierce office with a proposed staff of one senior accountant and one or two staff accountants supervised by an audit manager and audit partner. With the exception of the directors of the firm's offices, the professional staff is not specifically assigned to any of our individual offices. The professional and administrative staff resources available to you through Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL are as follows:

	Total
Partners/Directors (CPA's)	7
Managers (1 CPA)	2
Senior/Supervisor Accountants (1 CPA)	3
Staff Accountants	8
Paraprofessional	6
Administrative	6
Total – all personnel	32

Following is a brief description of each employee classification:

Staff Accountant – Staff accountants work directly under the constant supervision of the auditor-in-charge and, are responsible for the various testing of documents, account analysis and any other duties as his/her supervisor believes appropriate. Minimum qualification for a staff accountant is graduation from an accredited university or college with a degree in accounting or equivalent.

Senior Accountant – A senior accountant must possess all the qualifications of the staff accountant, in addition to being able to draft the necessary reports and financial statements, and supervise other staff accountants when necessary.

Managers – A manager must possess the qualifications of the senior accountant, plus be able to work without extensive supervision from the auditor-in-charge. The manager should be able to draft audit reports from start to finish and to supervise the audit team, if necessary.

Partner/Director – The director has extensive governmental auditing experience and acts as the auditor-in-charge. Directors have a financial interest in the firm.

Professional Staff Resources (Continued)

Independence – Independence of the public accounting firm, with respect to the audit client, is the foundation from which the public gains its trust in the opinion issued by the public accounting firm at the end of the audit process. This independence must be in appearance as well as in fact. The public must perceive that the accounting firm is independent of the audit entity to ensure that nothing would compromise the opinion issued by the public accounting firm. **Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL** is independent of The Groves of St. Lucie County Community Development District, including its elected officials and related parties, at the date of this proposal, as defined by the following rules, regulations, and standards:

Au-C Section 220 – Statements on Auditing Standards issued by the American Institute of Certified Public Accountants;

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

Chapter 21A-1, Florida Administrative Code;

Section 473.315, Florida Statutes; and,

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

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

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

Ability to Furnish the Required Services

As previously noted in the Profile of the Proposer section of this document, our firm has been in existence for over 74 years. We have provided audit services to some clients for over 30 years continually. Our firm is insured against physical loss through commercial insurance and we also carry liability insurance. The majority of our audit documentation is stored electronically, both on our office network and on each employee laptop or computer assigned to each specific job. Our office computer network is backed up on tape, so in the event of a total equipment loss, we can restore all data as soon as replacement equipment is acquired. In addition, our field laptop computers carry the same data and can be used in the event of emergency with virtually no delay in completing the required services.

GOVERNMENTAL AUDITING EXPERIENCE

Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL has been practicing public accounting in Florida for 70 years. Our success over the years has been the result of a strong commitment to providing personalized quality service to our clients.

The current members of our firm have performed audits of over 1,100 community development districts, and over 2,100 audits of municipalities, counties and other governmental entities such as the City of Fort Pierce and St. Lucie County.

Our firm provides a variety of accounting, auditing, tax litigation support, and consulting services. Some of the professional accounting, auditing and management consulting services that are provided by our firm are listed below:

- Performance of annual financial and compliance audits, including Single Audits of state and federal financial assistance programs, under the provisions of the Single Audit Act, Subpart F of Title 2 U.S. Code of Federal Regulations (CFR) Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance), with minimal disruptions to your operations;
- Performance of special compliance audits to ascertain compliance with the applicable local, state and federal laws and regulations;
- Issuance of comfort letters and consent letters in conjunction with the issuance of tax-exempt debt obligations, including compiling financial data and interim period financial statement reviews;
- Calculation of estimated and actual federal arbitrage rebates;
- Assistance in compiling historical financial data for first-time and supplemental submissions for GFOA Certificate of Achievement for Excellence in Financial Reporting;
- Preparation of indirect cost allocation systems in accordance with Federal and State regulatory requirements;
- Providing human resource and employee benefit consulting;
- Performance of automation feasibility studies and disaster recovery plans;
- Performance feasibility studies concerning major fixed asset acquisitions and utility plant expansion plans (including electric, water, pollution control, and sanitation utilities); and
- Assistance in litigation, including testimony in civil and criminal court.
- Assist clients who utilize QuickBooks software with their software needs. Our Certified QuickBooks Advisor has undergone extensive training through QuickBooks and has passed several exams to attain this Certification.

Continuing Professional Education

All members of the governmental audit staff of our firm, and audit team members assigned to this engagement, are in compliance with the Continuing Professional Education (CPE) requirements set forth in Government Auditing Standards issued by the Comptroller General of the United States. In addition, our firm is in compliance with the applicable provisions of the Florida Statutes that require CPA's to have met certain CPE requirements prior to proposing on governmental audit engagements.

GOVERNMENTAL AUDITING EXPERIENCE (CONTINUED)

The audit team has extensive experience in performing governmental audits and is exposed to intensive and continuing concentration on these types of audits. Due to the total number of governmental audits our team performs, each member of our governmental staff must understand and be able to perform several types of governmental audits. It is our objective to provide each professional employee fifty hours or more of comprehensive continuing professional education each year. This is accomplished through attending seminars throughout Florida and is reinforced through in-house training.

Our firm has made a steadfast commitment to professional education. Our active attendance and participation in continuing professional education is a major part of our objective to obtain the most recent knowledge on issues which are of importance to our clients. We are growing on the reputation for work that our firm is providing today.

Quality Control Program

Quality control requires continuing commitment to professional excellence. **Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL** is formally dedicated to that commitment.

To ensure maintaining the standards of working excellence required by our firm, we joined the Private Companies Practice Section (PCPS) of the American Institute of Certified Public Accountants (AICPA). To be a participating member firm of this practice section, a firm must obtain an independent Peer Review of its quality control policies and procedures to ascertain the firm's compliance with existing auditing standards on the applicable engagements.

The scope of the Peer Review is comprehensive in that it specifically reviews the following quality control policies and procedures of the participating firm:

- Professional, economic, and administrative independence;
- Assignment of professional personnel to engagements;
- Consultation on technical matters;
- Supervision of engagement personnel;
- Hiring and employment of personnel;
- Professional development;
- Advancement;
- Acceptance and continuation of clients; and,
- Inspection and review system.

We believe that our commitment to the program is rewarding not only to our firm, but primarily to our clients.

The external independent Peer Review of the elements of our quality control policies and procedures performed by an independent certified public accountant, approved by the PCPS of the AICPA, provides you with the assurance that we continue to conform to standards of the profession in the conduct of our accounting and auditing practice.

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Our firm is also a member of Governmental Audit Quality Center (GAQC), a voluntary membership center for CPA firms that perform governmental audits. This center promotes the quality of governmental audits.

Our firm has completed successive Peer Reviews. These reviews included a representative sample of our firm's local governmental auditing engagements. As a result of these reviews, our firm obtained an unqualified opinion on our quality control program and work procedures. On page 33 is a copy of our most recent Peer Review report. It should be noted that we received a pass rating.

Our firm has never had any disciplinary actions by state regulatory bodies or professional organizations.

As our firm performs approximately one hundred audits each year that are reviewed by federal, state or local entities, we are constantly dealing with questions from these entities about our audits. We are pleased to say that any questions that have been raised were minor issues and were easily resolved without re-issuing any reports.

Certificate of Achievement for Excellence in Financial Reporting (CAFR)
We are proud and honored to have been involved with the City of Fort Pierce and the Fort Pierce Utilities Authority when they received their first Certificates of Achievement for Excellence in Financial Reporting for the fiscal years ended September 30, 1988 and 1994, respectively. We were also instrumental in the City of Stuart receiving the award, in our first year of performing their audit, for the year ended September 30, 1999.

We also assisted St. Lucie County, Florida for the year ended September 30, 2003, in preparing their first Comprehensive Annual Financial Report, and St. Lucie County has received their Certificate of Achievement for Excellence in Financial Reporting every year since.

As continued commitment to insuring that we are providing the highest level of experience, we have had at least one employee of our firm serve on the GFOA – Special Review Committee since the mid-1980s. This committee is made up of selective Certified Public Accountants throughout the United States who have demonstrated their high level of knowledge and expertise in governmental accounting. Each committee member attends a special review meeting at the Annual GFOA Conference. At this meeting, the committee reports on the Certificate of Achievement Program's most recent results, future goals, and common reporting deficiencies.

We feel that our previous experience in assisting the City of Fort Pierce, the Fort Pierce Utilities Authority and St. Lucie County obtain their first CAFRs, and the City of Stuart in continuing to receive a CAFR and our firm's continued involvement with the GFOA, and the CAFR review committee make us a valued asset for any client in the field of governmental financial reporting.

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

References

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

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

Gateway Services Community Development District
Stephen Bloom, Inframark LLC
(954) 753-5841

Clearwater Cay Community Development District
Cal Teague, Premier District Management
(239) 690-7100 ext 101

In addition to the above, we have the following additional governmental audit experience:

Community Development Districts

Aberdeen Community Development District

Alta Lakes Community Development District

Amelia Concourse Community Development District

Amelia Walk Communnity Development District

Aqua One Community Development District

Arborwood Community Development District

Arlington Ridge Community Development District

Bartram Springs Community Development District

Baytree Community Development District

Beacon Lakes Community Development District

Beaumont Community Development District

Bella Collina Community Development District

Bonnet Creek Community Development District

Buckeye Park Community Development District

Candler Hills East Community Development District

Cedar Hammock Community Development District

Central Lake Community Development District

Channing Park Community Development District

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Cheval West Community Development District

Coconut Cay Community Development District

Colonial Country Club Community Development District

Connerton West Community Development District

Copperstone Community Development District

Creekside @ Twin Creeks Community Development District

Deer Run Community Development District

Dowden West Community Development District

DP1 Community Development District

Eagle Point Community Development District

East Nassau Stewardship District

Eastlake Oaks Community Development District

Easton Park Community Development District

Estancia @ Wiregrass Community Development District

Evergreen Community Development District

Forest Brooke Community Development District

Gateway Services Community Development District

Gramercy Farms Community Development District

Greenway Improvement District

Greyhawk Landing Community Development District

Griffin Lakes Community Development District

Habitat Community Development District

Harbor Bay Community Development District

Harbourage at Braden River Community Development District

Harmony Community Development District

Harmony West Community Development District

Harrison Ranch Community Development District

Hawkstone Community Development District

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Heritage Harbor Community Development District

Heritage Isles Community Development District

Heritage Lake Park Community Development District

Heritage Landing Community Development District

Heritage Palms Community Development District

Heron Isles Community Development District

Heron Isles Community Development District

Highland Meadows II Community Development District

Julington Creek Community Development District

Laguna Lakes Community Development District

Lake Bernadette Community Development District

Lakeside Plantation Community Development District

Landings at Miami Community Development District

Legends Bay Community Development District

Lexington Oaks Community Development District

Live Oak No. 2 Community Development District

Madeira Community Development District

Marhsall Creek Community Development District

Meadow Pointe IV Community Development District

Meadow View at Twin Creek Community Development District

Mediterra North Community Development District

Midtown Miami Community Development District

Mira Lago West Community Development District

Montecito Community Development District

Narcoossee Community Development District

Naturewalk Community Development District

New Port Tampa Bay Community Development District

Overoaks Community Development District

Panther Trace II Community Development District

Paseo Community Development District

Pine Ridge Plantation Community Development District

Piney Z Community Development District

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Poinciana Community Development District

Poinciana West Community Development District

Port of the Islands Community Development District

Portofino Isles Community Development District

Quarry Community Development District

Renaissance Commons Community Development District

Reserve Community Development District

Reserve #2 Community Development District

River Glen Community Development District

River Hall Community Development District

River Place on the St. Lucie Community Development District

Rivers Edge Community Development District

Riverwood Community Development District

Riverwood Estates Community Development District

Rolling Hills Community Development District

Rolling Oaks Community Development District

Sampson Creek Community Development District

San Simeon Community Development District

Six Mile Creek Community Development District

South Village Community Development District

Southern Hills Plantation I Community Development District

Southern Hills Plantation III Community Development District

South Fork Community Development District

St. John's Forest Community Development District

Stoneybrook South Community Development District

Stoneybrook South at ChampionsGate Community Development District

Stoneybrook West Community Development District

Tern Bay Community Development District

Terracina Community Development District

Tison's Landing Community Development District

TPOST Community Development District

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Triple Creek Community Development District

TSR Community Development District

Turnbull Creek Community Development District

Twin Creeks North Community Development District

Urban Orlando Community Development District

Verano #2 Community Development District

Viera East Community Development District

VillaMar Community Development District

Vizcaya in Kendall Development District

Waterset North Community Development District

Westside Community Development District

WildBlue Community Development District

Willow Creek Community Development District

Willow Hammock Community Development District

Winston Trails Community Development District

Zephyr Ridge Community Development District

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Other Governmental Organizations

City of Westlake

Florida Inland Navigation District

Fort Pierce Farms Water Control District

Indian River Regional Crime Laboratory, District 19, Florida

Viera Stewardship District

Office of the Medical Examiner, District 19

Rupert J. Smith Law Library of St. Lucie County

St. Lucie Education Foundation

Seminole Improvement District

Troup Indiantown Water Control District

Current or Recent Single Audits

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

Members of our audit team have acquired extensive experience from performing or participating in over 1,800 audits of governments, independent special taxing districts, school boards, and other agencies that receive public money and utilize fund accounting.

Much of our firm's auditing experience is with compliance auditing, which is required for publicly financed agencies. In this type of audit, we do a financial examination and also confirm compliance with various statutory and regulatory guidelines.

Following is a summary of our other experience, including Auditor General experience, as it pertains to other governmental and fund accounting audits.

Counties
(Includes elected constitutional officers, utilities and dependent taxing districts)

Indian River
Martin
Okeechobee
Palm Beach

Municipalities

City of Port St. Lucie
City of Vero Beach
Town of Orchid

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Special Districts

Bannon Lakes Community Development District
Boggy Creek Community Development District
Capron Trail Community Development District
Celebration Pointe Community Development District
Coquina Water Control District
Diamond Hill Community Development District
Dovera Community Development District
Durbin Crossing Community Development District
Golden Lakes Community Development District
Lakewood Ranch Community Development District
Martin Soil and Water Conservation District
Meadow Pointe III Community Development District
Myrtle Creek Community Development District
St. Lucie County – Fort Pierce Fire District
The Crossings at Fleming Island
St. Lucie West Services District
Indian River County Mosquito Control District
St. John's Water Control District
Westchase and Westchase East Community Development Districts
Pier Park Community Development District
Verandahs Community Development District
Magnolia Park Community Development District

Schools and Colleges

Federal Student Aid Programs – Indian River Community College
Indian River Community College
Okeechobee County District School Board
St. Lucie County District School Board
Indian River School District – Internal Accounts

State and County Agencies

Central Florida Foreign-Trade Zone, Inc. (a nonprofit organization affiliated with the St. Lucie County Board of County Commissioners)
Florida School for Boys at Okeechobee
Indian River Community College Crime Laboratory
Indian River Correctional Institution

FEE SCHEDULE

We propose the fee for our audit services described below to be $2,800 for the year ended September 30, 2025, $3,500 for the years ending September 30, 2026 and 2027, $3,600 for the years ending September 30, 2028 and 2029. In addition, if a bond issuance occurs during the fiscal year, there will be an additional fee of $1,400 per issuance. The fee is contingent upon the financial records and accounting systems of The Groves of St. Lucie County Community Development District being “audit ready” and the financial activity for the District is not materially increased. If we discover that additional preparation work or subsidiary schedules are needed, we will consult with your authorized representative. We can assist with this additional work at our standard rates should you desire.

SCOPE OF WORK TO BE PERFORMED

If selected as the District's auditors, we will perform a financial and compliance audit in accordance with Section 11.45, Florida Statutes, in order to express an opinion on an annual basis on the financial statements of The Groves of St. Lucie County Community Development District as of September 30, 2025, 2026, 2027, 2028 and 2029. The audits will be performed to the extent necessary to express an opinion on the fairness in all material respects with which the financial statements present the financial position, results of operations and changes in financial position in conformity with generally accepted accounting principles and to determine whether, for selected transactions, operations are properly conducted in accordance with legal and regulatory requirements. Reportable conditions that are also material weaknesses shall be identified as such in the Auditors' Report on Internal Control over Financial Reporting and on Compliance and Other Matters. Other (non-reportable) conditions discovered during the course of the audit will be reported in a separate letter to management, which will be referred to in the Auditors' Report on Internal Control over Financial Reporting and on Compliance and Other Matters.

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

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

Commitment to Quality Service

Personnel Qualifications and Experience

David S. McGuire, CPA, CITP
Director – 31 years experience

Education
- University of Central Florida, B.A. – Accounting
- Barry University – Master of Professional Accountancy

Registrations
- Certified Public Accountant – State of Florida, State Board of Accountancy
- Certified Information Technology Professional (CITP) – American Institute of Certified Public Accountants
- Certified Not-For-Profit Core Concepts 2018

Professional Affiliations/Community Service
- Member of the American and Florida Institutes of Certified Public Accountants
- Associate Member, Florida Government Finance Office Associates
- Assistant Coach – St. Lucie County Youth Football Organization (1994 – 2005)
- Assistant Coach – Greater Port St. Lucie Football League, Inc. (2006 – 2010**)**
- Board Member – Greater Port St. Lucie Football League, Inc. (2011 – 2017)
- Treasurer, AIDS Research and Treatment Center of the Treasure Coast, Inc. (2000 – 2003)
- Board Member/Treasurer, North Treasure Coast Chapter, American Red Cross (2004 – 2010)
- Member/Board Member of Port St. Lucie Kiwanis (1994 – 2001)
- President (2014/15) of Sunrise Kiwanis of Fort Pierce (2004 – 2017)
- St. Lucie District School Board Superintendent Search Committee (2013 – present)
- Board Member – Phrozen Pharoes (2019-2021)

Professional Experience
- Twenty-eight years public accounting experience with an emphasis on nonprofit and governmental organizations.
- Audit Manager in-charge on a variety of audit and review engagements within several industries, including the following government and nonprofit organizations:
  - St. Lucie County, Florida
  - 19th Circuit Office of Medical Examiner
  - Troup Indiantown Water Control District
  - Exchange Club Center for the Prevention of Child Abuse, Inc.
  - Healthy Kids of St. Lucie County
  - Mustard Seed Ministries of Ft. Pierce, Inc.
  - Reaching Our Community Kids, Inc.
  - Reaching Our Community Kids - South
  - St. Lucie County Education Foundation, Inc.
  - Treasure Coast Food Bank, Inc.
  - North Springs Improvement District
- Four years of service in the United States Air Force in computer operations, with a top secret (SCI/SBI) security clearance.

Personnel Qualifications and Experience

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

Continuing Professional Education

- Mr. McGuire has attended numerous continuing professional education courses and seminars taught by nationally recognized sponsors in the accounting auditing and single audit compliance areas. He has attended courses over the last two years in those areas as follows:

  Not-for-Profit Auditing Financial Results and Compliance Requirements
  Update: Government Accounting Reporting and Auditing
  Annual Update for Accountants and Auditors

Commitment to Quality Service

Personnel Qualifications and Experience

Matthew Gonano, CPA
Director – 14 years total experience

Education
- University of North Florida, B.B.A. – Accounting
- University of Alicante, Spain – International Business
- Florida Atlantic University – Masters of Accounting

Professional Affiliations/Community Service

- American Institute of Certified Public Accountants
- Florida Institute of Certified Public Accountants

Professional Experience

- Senior Accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.
- Performed audits of nonprofit and governmental organizations in accordance with Governmental Accounting Auditing Standards (GAAS)
- Performed Single Audits of nonprofit organizations in accordance with OMB Circular A-133, Audits of State, Local Governments, and Non-Profit Organizations.

Continuing Professional Education
- Mr. Gonano has participated in numerous continuing professional education courses.

Commitment to Quality Service

Personnel Qualifications and Experience

Melissa Marlin, CPA
Director – 12 years

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

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

Professional Affiliations/Community Service

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

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

Continuing Professional Education
- Mrs. Marlin participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments in accounting and auditing such as:
    - Governmental Accounting Report and Audit Update
    - Analytical Procedures, FICPA
    - Annual Update for Accountants and Auditors
    - Single Audit Sampling and Other Considerations

Commitment to Quality Service

Personnel Qualifications and Experience

Maritza Stonebraker, CPA
Director – 10 years

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

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

Professional Affiliations/Community Service

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

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

Continuing Professional Education
- Mrs. Stonebraker participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments in accounting and auditing such as:
    - Governmental Accounting Report and Audit Update
    - Analytical Procedures, FICPA
    - Annual Update for Accountants and Auditors
    - Single Audit Sampling and Other Considerations

Commitment to Quality Service

Personnel Qualifications and Experience

Jonathan Herman, CPA
Director – 12 years

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

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

Professional Affiliations/Community Service
- Member of the American and Florida Institutes of Certified Public Accountants
- Affiliate member Government Finance Officers Association

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

Continuing Professional Education
- Has participated in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments. He has attended courses in those areas over the last two years such as:
  Governmental Accounting Report and Audit Update
  Annual Update: Government Accounting Reporting and Auditing
  Annual Update for Accountants and Auditors

Commitment to Quality Service

Personnel Qualifications and Experience

David F. Haughton, CPA
Accounting and Audit Manager – 34 years

Education
- Stetson University, B.B.A. – Accounting

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

Professional Affiliations/Community Service
- Member of the American and Florida Institutes of Certified Public Accountants
- Former Member of Florida Institute of Certified Public Accountants Committee on State and Local Government
- Affiliate Member Government Finance Officers Association (GFOA) for over 10 years
- Affiliate Member Florida Government Finance Officers Association (FGFOA) for over 10 years
- Technical Review – 1997 FICPA Course on State and Local Governments in Florida
- Board of Directors – Kiwanis of Ft. Pierce, Treasurer – 1994-1999; Vice President – 1999-2001

Professional Experience
- Twenty-seven years public accounting experience with an emphasis on governmental and nonprofit organizations.
- State Auditor General's Office – West Palm Beach, Staff Auditor, June 1985 to September 1985
- Accounting and Audit Manager of Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants PL, responsible for audit and accounting services including governmental and not-for-profit audits.
- Over 20 years of public accounting and governmental experience, specializing in governmental and nonprofit organizations with concentration in special districts, including Community Development Districts which provide services including water and sewer utilities. Governmental and non-profit entities served include the following:

  Counties:
  St. Lucie County

  Municipalities:
  City of Fort Pierce
  City of Stuart

Commitment to Quality Service

Personnel Qualifications and Experience

David F. Haughton, CPA (Continued)
Accounting and Audit Manager

Professional Experience (Continued)

Special Districts:
Bluewaters Community Development District
Country Club of Mount Dora Community Development District
Fiddler's Creek Community Development District #1 and #2
Indigo Community Development District
North Springs Improvement District
Renaissance Commons Community Development District
St. Lucie West Services District
Stoneybrook Community Development District
Summerville Community Development District
Terracina Community Development District
Thousand Oaks Community Development District
Tree Island Estates Community Development District
Valencia Acres Community Development District

Non-Profits:
The Dunbar Center, Inc.
Hibiscus Children's Foundation, Inc.
Hope Rural School, Inc.
Maritime and Yachting Museum of Florida, Inc.
Tykes and Teens, Inc.
United Way of Martin County, Inc.
Workforce Development Board of the Treasure Coast, Inc.

- While with the Auditor General's Office he was on the staff for the state audits of the Martin County School District and Okeechobee County School District.
- During 1997 he performed a technical review of the Florida Institute of Certified Public Accountants state CPE course on Audits of State and Local Governments in Florida. His comments were well received by the author and were utilized in future updates to the course.

Continuing Professional Education

- During the past several years, he has participated in numerous professional development training programs sponsored by the AICPA and FICPA, including state conferences on special districts and governmental auditing in Florida. He averages in excess of 100 hours bi-annually of advanced training which exceeds the 80 hours required in accordance with the continuing professional education requirements of the Florida State Board of accountancy and the AICPA Private Companies Practice Section. He has over 75 hours of governmental CPE credit within the past two years.

Commitment to Quality Service

Personnel Qualifications and Experience

Paul Daly
Senior Accountant – 14 years

Education
- Florida Atlantic University, B.S. – Accounting

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

Continuing Professional Education
- Working to attain the requirements to take the Certified Public Accounting (CPA) exam.

Personnel Qualifications and Experience

Bryan Snyder
Manager – 11 years

Education
- Florida Atlantic University, B.B.A. – Accounting

Professional Experience
- Accountant beginning his professional auditing career with Berger, Toombs, Elam, Gaines, & Frank.
- Mr. Snyder is gaining experience auditing governmental & nonprofit entities.

Continuing Professional Education
- Mr. Snyder participates in numerous continuing education courses and plans on working to acquire his CPA certificate.
- Mr. Snyder is currently studying to pass the CPA exam.

Commitment to Quality Service

Personnel Qualifications and Experience

Tifanee Terrell, CPA
Senior Accountant – 5 years

Education

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

Professional Experience

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

Continuing Professional Education

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

Personnel Qualifications and Experience

Dylan Dixon
Senior Accountant – 4 years

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

Professional Experience
- Senior Accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

Continuing Professional Education
- Mr. Dixon participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.
- Mr. Dixon is currently studying to pass the CPA exam.

Personnel Qualifications and Experience

Brennen Moore
Staff Accountant – 3 years

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

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

Continuing Professional Education
- Mr. Moore participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.

Commitment to Quality Service

Personnel Qualifications and Experience

Katie Gifford
Staff Accountant – 2 years

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

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

Continuing Professional Education
- Ms. Gifford participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.

Commitment to Quality Service

Personnel Qualifications and Experience

Rayna Zicari
Staff Accountant – 2 years

Education
- Stetson University, B.B.A. – Accounting

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

Continuing Professional Education
- Ms. Zicari participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.

Personnel Qualifications and Experience

Deandre McFadden
Staff Accountant – 1 year

Education

- Florida Atlantic University, B.S. – Accounting

Professional Experience

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

Continuing Professional Education

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

6930 Gall Boulevard
Suite 200
Zephyrhills, FL 33542

813.788.2155
DGPerry.com

Report on the Firm's System of Quality Control

December 4, 2025

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

We have reviewed the system of quality control for the accounting and auditing practice of Berger, Toombs, Elam, Gaines & Frank, CPAs, PL, in effect for the year ended May 31, 2025. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants (Standards). A summary of the nature, objectives, scope, limitations of, and the procedures performed in a system review as described in the Standards may be found at www.aicpa.org/prsummary. The summary also includes an explanation of how engagements identified as not performed or reported on in conformity with applicable professional standards, if any, are evaluated by a peer reviewer to determine a peer review rating.

Firm's Responsibility

The firm is responsible for designing and complying with a system of quality control to provide the firm with reasonable assurance of performing and reporting in conformity with the requirements of applicable professional standards in all material respects. The firm is also responsible for evaluating actions to promptly remediate engagements deemed as not performed or reported on in conformity with the requirements of applicable professional standards, when appropriate, and for remediating weaknesses in its system of quality control, if any.

Peer Reviewer's Responsibility

Our responsibility is to express an opinion on the design of and compliance with the firm's system of quality control based on our review.

Required Selections and Considerations

Engagements selected for review included engagements performed under *Government Auditing Standards*, including a compliance audit under the Single Audit Act.

As a part of our peer review, we considered reviews by regulatory entities as communicated by the firm, if applicable, in determining the nature and extent of our procedures.

Opinion

In our opinion, the system of quality control for the accounting and auditing practice of Berger, Toombs, Elam, Gaines & Frank, CPAs, PL , in effect for the year ended May 31, 2025 has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of pass, pass with deficiency(ies), or fail. Berger, Toombs, Elam, Gaines & Frank, CPAs, PL has received a peer review rating of pass.

DG Perry

DGPerry
CPAs + Advisors

THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT
AUDITOR SELECTION
EVALUATION CRITERIA

1. Ability of Personnel. **(20 Points)**

(E.g., geographic location of the firm's headquarters or permanent office in relation to the project; capabilities and experience of key personnel; present ability to manage this project; evaluation of existing work load; proposed staffing levels, etc.)

2. Proposer's Experience. **(20 Points)**

(E.g. past record and experience of the Proposer in similar projects; volume of work previously performed by the firm; past performance for other or current Community Development District(s) in other contracts; character, integrity, reputation of Proposer, etc.)

3. *Understanding of Scope of Work.* **(20 Points)**

Extent to which the proposal demonstrates an understanding of the District's needs for the services requested.

4. Ability to Furnish the Required Services. **(20 Points)**

Extent to which the proposal demonstrates the adequacy of Proposer's financial resources and stability as a business entity necessary to complete the services required.

5. Price. **(20 Points)*****

Points will be awarded based upon the lowest total proposal for rendering the services and the reasonableness of the proposal.

Total **(100 Points)**

***Alternatively, the Board may choose to evaluate firms without considering price, in which case the remaining categories would be assigned 25 points each.

THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT

REQUEST FOR PROPOSALS

District Auditing Services for Fiscal Year 2025
St. Lucie County, Florida

INSTRUCTIONS TO PROPOSERS

SECTION 1. DUE DATE. Sealed proposals must be received no later than February 18, 2026 at 12:00 p.m., at the offices of District Manager, located at Wrathell, Hunt and Associates, LLC, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431. Proposals will be publicly opened at that time.

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

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

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

SECTION 5. SUBMISSION OF PROPOSAL. Submit one (1) electronic and one (1) unbound copy of the Proposal Documents, and other requested attachments at the time and place indicated herein, which shall be enclosed in an opaque sealed envelope, marked with the title "Auditing Services – The Groves of St. Lucie County Community Development District" on the face of it. **Please include pricing for each additional bond issuance.**

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

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

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

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

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

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

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

A. List the position or title of all personnel to perform work on the District audit. Include resumes for each person listed; list years of experience in present position for each party listed and years of related experience.

B. Describe proposed staffing levels, including resumes with applicable certifications.

C. Three references from projects of similar size and scope. The Proposer should include information relating to the work it conducted for each reference as well as a name, address and phone number of a contact person.

D. The lump sum cost of the provision of the services under the proposal, plus the lump sum cost of four (4) annual renewals.

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

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

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

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

11CII

Professional Services Proposal for

The Groves of St. Lucie County Community Development District

February 18, 2026

Proposer

Carr, Riggs & Ingram
189 Eglin Parkway NE, 2nd Floor
Fort Walton Beach, FL 32548
Phone: 850.244.8395
Fax: 850.424.7139

Submitted by

K. Alan Jowers
Partner, CRI Advisors, Inc.
Partner, Carr, Riggs & Ingram, L.L.C.
ajowers@criadv.com

†This is not a CPA Firm.

*Assurance, attest, and audit services provided by Carr, Riggs & Ingram, L.L.C.

"Carr, Riggs & Ingram" and "CRI" are the brand names under which Carr, Riggs & Ingram, L.L.C.* ("CRI CPA**"), CRI Advisors, LLC† ("CRI Advisors†" or "Advisors†"), and Capin Crouse, LLC* ("Capin Crouse CPA**"), and CRI Capin Crouse Advisors, LLC† ("Capin Crouse Advisors†") provide professional services. CRI CPA*, Capin Crouse CPA*, CRI Advisors†, Capin Crouse Advisors†, Carr, Riggs & Ingram Capital, LLC and their respective subsidiaries operate as an alternative practice structure in accordance with the AICPA Code of Professional Conduct and applicable law, regulations and professional standards. CRI CPA* and Capin Crouse CPA* are licensed independent certified public accounting ("CPA") firms that separately provide attest services, as well as additional ancillary services, to their clients. CRI CPA* and Capin Crouse CPA* are independently-owned CPA firms that provide attestation services separate from one another. CRI Advisors† and Capin Crouse Advisors† provide tax and business consulting services to its clients. CRI Advisors† and its subsidiaries, including Capin Crouse Advisors†, are not licensed CPA firms and will not provide any attest services. The entities falling under the Carr, Riggs & Ingram or CRI brand are independently owned and are not responsible or liable for the services and/or products provided, or engaged to be provided, by any other entity under the Carr, Riggs & Ingram or CRI brand. Our use of the terms "CRI," "we," "our," "us," and terms of similar import, denote the alternative practice structure conducted by CRI CPA*, Capin Crouse CPA*, Capin Crouse Advisors†, and CRI Advisors†, as appropriate.

Dear The Groves of St. Lucie County Community Development District:

We appreciate the opportunity to propose on audit services to The Groves of St. Lucie County Community Development District. We are eager to establish a long-term partnership that delivers immediate and ongoing value through our tailored solutions and competitive fee structure.

At CRI, our dedicated team of over 2,000 professionals aligns their expertise with your specific needs, ensuring seamless service from the start. CRI delivers big firm expertise with small firm service. Of approximately 46,000 public accounting firms in the United States, CRI currently ranks in the top 25. Additionally, as a part of PrimeGlobal, an association of independent accounting firms, we have access to international resources as – and when – needed. Leveraging these resources while maintaining local decision-making authority means that simplified solutions are only a phone call away. And we believe that's the best of both worlds for our clients.

Our partners bring over 7,500 years of collective business experience, focusing on delivering solutions that translate complex concepts into actionable insights. We strive to become trusted advisors by understanding your business and proactively contributing to your success. While accounting is the language of business, we're here to decipher the jargon and help you make educated decisions. CRInnovate embraces agility and invention.

We look forward to the opportunity to showcase our commitment to innovation, expertise, and responsiveness as one of the fastest-growing firms in the U.S. Thank you for considering our proposal.

Sincerely,

K. Alan Jowers
Partner, CRI Advisors, LLC
Partner, Carr, Riggs & Ingram, L.L.C.

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UNDERSTANDING & MEETING YOUR NEEDS

From the RFP or during our recent visit with your team, we understood your team to express the following needs, requests, and/or issues. We've detailed our proposed solutions below and are happy to discuss other related projects as they arise and upon request.

NEEDS & ISSUES		SOLUTIONS & SERVICES
Technical	The District is required to have independent audits performed on its financial statements.	Perform external audit services in accordance with auditing standards generally accepted in the United States of America (GAAS), in order to express an opinion on the The Groves of St. Lucie County Community Development District's financial statements.
Relational	The District's Board of Supervisors and management expect open and continuous communication with their CPA firm in order to avoid surprise findings at the end of the audit.	Communicate contemporaneously and directly with management regarding the results of our procedures. Anticipate and respond to concerns of management and/or the Audit Committee (if/when formed).

YOUR SERVICES AND FEES

We value creating mutually rewarding, long-term relationships with our clients. Our goal is to provide high quality, responsive service that yields returns far greater than your investment in our professional fees. Please find below our proposal of fees to provide the requested services for the upcoming fiscal years.

SERVICE	CRI FEES 2025
Perform external audit services in accordance with auditing standards generally accepted in the United States of America (GAAS).	$5,850

All of our invoices will include a 7% administrative fee.

The above fee quote is based in part on the fact that the District has not yet issued bonds or other debt instruments to finance capital asset acquisition and construction. In the event the District issues such debt instruments or upon construction of major infrastructure additions, the audit fee will increase by an amount not to exceed $3.000 per year.

If The Groves of St. Lucie County Community Development District requests additional services outside of this proposal, professional fee hourly rates are as follows, but may be negotiated depending on the project request:

CLASSIFICATION	HOURLY RATE
Partner	$325
Manager	$225
Senior	$150
Staff	$110
IT Specialist	$400
Fraud Specialist	$400

Our professional fees are based on the key assumptions that The Groves of St. Lucie County Community Development District will:

- Ensure that the predecessor's work papers will be made available for timely review, if applicable.
- Make available documents and work papers for review at The Groves of St. Lucie County Community Development District's headquarters location, although we may choose to review at alternate locations.
- Prepare certain schedules and analyses and provide supporting documents as requested.
- Assist us in obtaining an understanding of the accounting systems of The Groves of St. Lucie County Community Development District.
- Not experience a significant change in business operations or financial reporting standards.

CRI FIRM PROFILE

FOUNDED IN 1997 • **35+ MARKETS** across the United States & Mexico

Carr, Riggs & Ingram (CRI) is a top 25* nationally-ranked accounting and advisory firm driven by relationships to cultivate growth. From traditional accounting services to leading-edge business support, technology resources, and assurance* offerings, CRI's breadth and depth of expertise takes you from compliance to competitive advantage.

2,000+
PROFESSIONALS

TOP 25* FIRM
(as ranked by Accounting Today)

CRI FIRM VALUES:
- CLIENT SERVICE.
- RESPECT.
- INTEGRITY.

100,000+
CLIENTS

25+ YEARS
OF CONSISTENT GROWTH SINCE FORMATION

SERVICES

- Advisory
- Audit & Attest*
- Tax

INDUSTRY EXPERTISE

- Captive Insurance
- Commercial Real Estate
- Construction
- Financial Institutions
- Government & Public Sector
- Hospitals & Health Systems
- Insurance
- Manufacturing & Distribution
- Nonprofits
- Physician Groups
- Post-Acute Care
- Private Foundations
- Religious Organizations

CRI FAMILY OF COMPANIES

At CRI, we know that the best results come from a fully integrated approach to your business, organization, or family's financial well-being. The CRI Family of Companies works collectively to parallel our clients' evolving needs beyond traditional accounting, cutting-edge business support, technology solutions, outsourcing, and assurance*. By working side-by-side, our expansive suite of companies and their focused solutions provide more personalized, holistic advice that checks every box.

GOVERNMENT & PUBLIC SECTOR

CRI's seasoned governmental advisory team delivers in-depth, proactive guidance to help clients provide outstanding service to their communities and organizations.

Why CRI?

Our experienced governmental accounting team provides assurance, compliance, and dedicated support to educational institutions and governmental entities of all sizes. By leveraging technology, data analytics, and a foundational relationship-based approach, CRI's attuned governmental professionals tailor our service offerings to your organization's unique needs, allowing for closer collaboration and attention to detail. This approach enables us to improve your entity's operations while maintaining compliance and financial controls in the face of ever-changing regulatory scrutiny.

Related Services:

- Agreed Upon Procedures (AUPs)*
- Audit*
- Compliance Consulting
- Deferrals
- Financial Statement Preparation*
- Fraud & Forensics
- Internal Audit
- Performance Audits*
- Program Management & Administration
- Single Audit*

†This is not a CPA firm.
* Assurance, attest, and audit services provided by Carr, Riggs & Ingram, L.L.C.

"Carr, Riggs & Ingram" and "CRI" are the brand names under which Carr, Riggs & Ingram, L.L.C. ("CRI CPA"), CRI Advisors, LLC ("CRI Advisors" or "Advisors"), and Capin Crouse, LLC ("Capin Crouse CPA"), and CRI Capin Crouse Advisors, LLC ("Capin Crouse Advisors") provide professional services. CRI CPA, Capin Crouse CPA, CRI Advisors, Capin Crouse Advisors, Carr, Riggs & Ingram Capital, LLC and their respective subsidiaries operate as an alternative practice structure in accordance with the AICPA Code of Professional Conduct and applicable law, regulations and professional standards. CRI CPA and Capin Crouse CPA are licensed independent certified public accounting ("CPA") firms that separately provide attest services, as well as additional ancillary services, to their clients. CRI CPA and Capin Crouse CPA are independently-owned CPA firms that provide attestation services separate from one another. CRI Advisors and Capin Crouse Advisors provide tax and business consulting services to its clients. CRI Advisors and its subsidiaries, including Capin Crouse Advisors, are not licensed CPA firms and will not provide any attest services. The entities falling under the Carr, Riggs & Ingram or CRI brand are independently owned and are not responsible or liable for the services and/or products provided, or engaged to be provided, by any other entity under the Carr, Riggs & Ingram or CRI brand. Our use of the terms "CRI," "we," "our," "us," and terms of similar import, denote the alternative practice structure conducted by CRI CPA, Capin Crouse CPA, Capin Crouse Advisors, and CRI Advisors, as appropriate.

▶ CRIadv.com

RELEVANT EXPERIENCE

CRI delivers a depth of resources that ensures our understanding of your challenges and innovative solutions for overcoming them. Our team's combined experience is derived from providing audit, tax, consulting, and accounting outsourcing services. We parlay this vast experience and derived best practices into proven solutions that benefit you. Below we share specific, relevant client references; we encourage you to consult with them.

RELATIONSHIP	TIMELINE	SERVICE DESCRIPTION	RELEVANT POINTS TO CONSIDER
Rizzetta & Company Shawn Wildermuth 3434 Colwell Avenue Suite 200 Tampa, FL 33614 813.933.5571	2006 – Present	Annual Financial Statement Audits of Multiple CDDs	• Client service experience • Responsiveness to client needs • Long-term relationship • CDD management co.
GMS, LLC Dave DeNagy 14785 Old St. Augustine Road Suite 4 Jacksonville, FL 32258 904.288.9130	2006 – Present	Annual Financial Statement Audits of Multiple CDDs	• Client service experience • Responsiveness to client needs • Long-term relationship • CDD management co.
Wrathell, Hunt & Associates, LLC Jeffrey Pinder 2300 Glades Road Suite 410W Boca Raton, FL 33431 561.571.0010	2006 – Present	Annual Financial Statement Audits of Multiple CDDs	• Client service experience • Responsiveness to client needs • Long-term relationship • CDD management co.
PFM Group Consulting, LLC Jennifer Glasgow 12051 Corporate Blvd. Orlando, FL 32817 407.382.3256	2007 – Present	Annual Financial Statement Audits of Multiple CDDs	• Client service experience • Responsiveness to client needs • Long-term relationship • CDD management co.

K. Alan Jowers

Partner, CRI Advisors, LLC
Partner, Carr, Riggs & Ingram, L.L.C.

ajowers@criadv.com
850.337.3213 | Direct

Representative Clients

- Reynolds Owners Association
- The Tides of Destin Condominium Association
- 1075 Peachtree Master Condominium Association
- Holley by the Sea Improvement Association
- Destin on the Gulf Condominium Association
- Santa Rosa County District School Board
- Santa Rosa Island Authority
- Okaloosa County District School Board
- Monroe County School District

Experience

Alan has over 30 years of experience in public accounting primarily with financial statement assurance engagements. His practice includes condominium and homeowner associations, local governmental entities, non-profit organizations, and nonpublic companies. He currently has direct engagement responsibility for a significant number of audits throughout the state of Florida and in other states.

Alan is licensed to practice as a certified public accountant in Florida and Georgia. He is a former member of the Board of Directors of the Florida Institute of Certified Public Accountants (FICPA), has been an active member and past chair of its Common Interest Realty Association Committee, and is a member of the Florida and National legislative alliances of the Community Associations Institute. He is also active in the Florida Governmental Finance Officers Association (FGFOA) and is a former member of the FGFOA's statewide Technical Resource Committee.

Education, Licenses & Certifications

- Masters of Accountancy, University of Alabama
- BS, Accounting, Florida State University
- Certified Public Accountant

Professional Affiliations

- American Institute of Certified Public Accountants (AICPA)
- Florida Institute of Certified Public Accountants (FICPA)
- Community Associations Institute (CAI) - member of the Florida Legislative Alliance and the national Government and Public Affairs Committee
- Governmental Finance Officers Association (GFOA)
- Florida Governmental Finance Officers Association (FGFOA)

Lauren Villarreal

Partner, CRI Advisors, LLC
Partner, Carr, Riggs & Ingram, L.L.C.

lvillarreal@criadv.com
850.337.3223 | Direct

Representative Clients

- Community Development Districts
- Condominium and Homeowner Associations
- Employee Benefit Plans
- County and Local Governments
- Non-Profit Organizations

Experience

Lauren has over 10 years auditing and accounting experience in the Destin office of CRI. She is an audit partner with primary responsibility for fieldwork and reporting on audits of clients in a variety of industries including local governmental and non-profit entities as well as employee benefit plans and commercial businesses. She is currently the in-charge auditor for over two dozen community development districts with several CDD management companies in the State of Florida.

Lauren is licensed to practice as a Certified Public Accountant in Florida. She is a member of the American Institute of Certified Public Accountants and the Florida Institute of Certified Public Accountants. She exceeds all continuing professional education requirements related to Government Auditing Standards.

Lauren currently supervises engagements for many governmental entities in the State of Florida including community development districts and other special governments. She is active in our firm's governmental industry line as well as the condominium and homeowner association practice. In addition, Lauren has accumulated experience in Federal and Florida Single Audit Acts compliance monitoring and auditing. Lauren has performed several single audits of federal grants under OMB Circular A-133.

Education, Licenses & Certifications

- BS, Accounting, Florida State University
- BS, Business Administration, Florida State University
- Certified Public Accountant
- Community Association Manager (CAM), Licensed in Florida

Professional Affiliations

- American Institute of Certified Public Accountants (AICPA)
- Florida Institute of Certified Public Accountants (FICPA)

DELIVERING QUALITY TO YOU*

AUDIT METHODOLOGY

Our audit, tax, consulting, and client accounting services documentation is maintained electronically. Compliance with our methodology is regularly reviewed and evaluated as part of our internal quality program, which is further discussed in this section under **INTERNAL QUALITY CONTROL REVIEWS AND EXTERNAL REVIEWS.** Comprehensive policies and procedures governing all of our practices and addressing professional and regulatory standards and implementation issues are constantly updated for new professional developments and emerging issues. See the table of contents to identify the relevant audit approach and methodology detailed description section.

ENGAGEMENT QUALITY REVIEW PARTNER (CONCURRING PARTNER)

Audit engagements are assigned engagement quality review (EQR) partner, as appropriate. This role is one of the most important elements of our quality assurance process, as it provides for a timely, independent review of key accounting and auditing issues. The EQR partner also reviews the financial statements and related supporting documentation—including the disclosures—to evaluate their fair presentation under accounting principles generally accepted in the United States of America (GAAP).

INTERNAL QUALITY CONTROL REVIEWS AND EXTERNAL REVIEWS

Experienced partners and professional staff of our firm conduct quality control reviews of our audits. Our partners' work is reviewed annually, and the inspection process includes periodic testing of the effectiveness of our quality controls and a continuous improvement program. This risk-based annual inspection is intended to mimic the triennial peer review described in the following paragraph and are performed on completed engagements. In addition to this inspection, we perform in-process, "pre-issuance" reviews of partners' work that are chosen for using a risk-based selection process; these reviews are performed by our corporate quality control team. The combination of the in-process and completed engagements is part of our continuous improvement processes.

Peer reviews are performed every three years by another independent public accounting firm. The most recent review of our firm was performed in 2025 by Brown Edwards, whose report was the most favorable possible "Pass."

In addition, we are registered with the PCAOB and our 2024 PCAOB inspection report was also the most favorable possible—no audit deficiencies or quality control defects identified.

The 2025 PCAOB report can be viewed at **https://assets.pcaobus.org/pcaob-dev/docs/default-source/inspections/reports/documents/104-2025-016-carrriggs.pdf?sfvrsn=2089984d_2**.

SHARING CRI'S VALUES WITH YOU

We are proud of our hands-on, service-centric, and results-oriented approach. Combining that approach with quality controls and superior talent allows us to help you achieve your goals and strengthen your management systems and processes. This approach is further emphasized through our three core values which guide our team's behavior and function as the foundation for interactions with our clients and each other.

CLIENT SERVICE

Defining our brand by meeting or exceeding the highest expectations of our clients

RESPECT

Building productive, long-term relationships with each other that are based on mutual respect, trust, and sharing

INTEGRITY

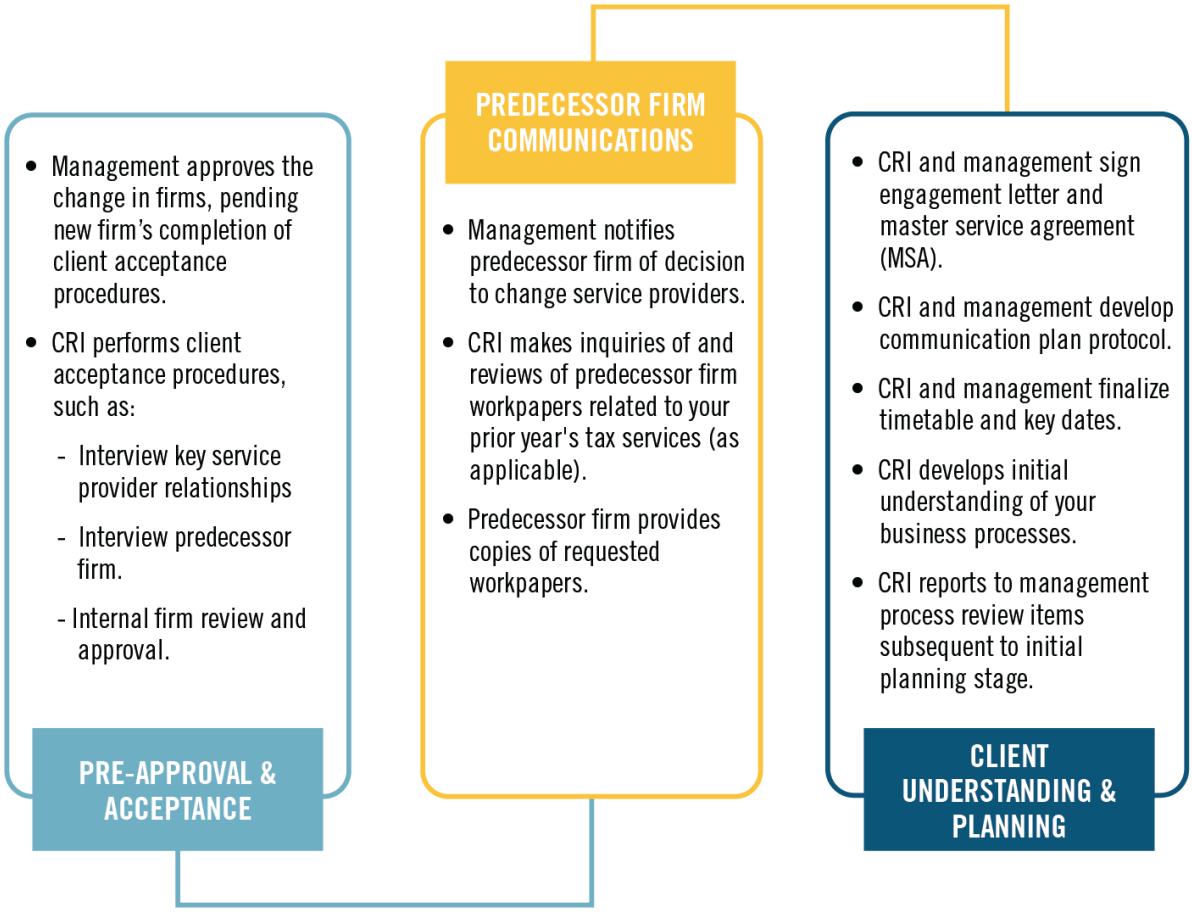
Living with sincerity, transparency, and honesty

TRANSITIONING YOU

When choosing to change firms, the time involved in working with new accounting professionals is often a concern. CRI's well-defined efficient, seamless transition process is designed to:

- Provide you with value from the very first encounter,
- Avoid interruption of service,
- Minimize disruption and investment of management's time,
- Raise the standard of service, and
- Establish ongoing channels of communication with The Groves of St. Lucie County Community Development District's management.

The transition plan is comprised of the following key activities and can occur within approximately two weeks, depending on the availability of the parties involved:



CRI'S GLOBAL RESOURCES

Many businesses are expanding and/or evaluating their global reach, and they require assistance in order to comprehensively consider the various financial implications of growing in international markets. In addition to CRI's internal resources, we deliver the expertise and support of some of the world's most highly regarded accounting firms through shared alliance as members of PrimeGlobal.

WHO IS PRIMEGLOBAL?

PrimeGlobal

An Association of Independent Accounting Firms

Revenue	Countries	Locations	Staff	Partners	Firms
$2.9B+	90+	850+	24,000+	2,100+	300+

HOW OUR PRIMEGLOBAL MEMBERS CAN BENEFIT YOU

We supplement our in-depth, industry knowledge and specialized services through our collaborations with other PrimeGlobal firms to help you evaluate your options globally. CRI's goal is to provide you with the information you need to make well-informed, smart business decisions.

4 KEY BENEFITS TO CRI CLIENTS FROM OUR PRIMEGLOBAL MEMBERSHIP

1. **SOLUTIONS** that are worldwide and world-class.
2. **ACCESSIBILITY** to knowledge and resources of statutory, regulatory, and compliance requirements throughout the world.
3. **DECISION MAKING** with the support of local connections and cultural understanding throughout regions of the world.
4. **SINGLE POINT OF CONTACT** CRI's team serves as your contact for each engagement, and we project manage across the entire team - including other PrimeGlobal firms and specialists.

JOIN OUR CONVERSATION

We know that some information that makes perfect sense to an advisor may not be as clear to our clients. Therefore, we produce original content in the form of articles, videos, white papers, webinars, and more to provide timely, down-to-earth translations of complex subjects. We publish this original content on CRIadv.com and across all our many social channels.

FOLLOW CRI ON SOCIAL MEDIA @CRIADVISORS

SUBSCRIBE TO THE CRI E-NEWSLETTER

CRIADV.COM/NEWSLETTER-SIGNUP

CRI: FROM FOUNDATION TO FUTURE

Over a quarter-century, Carr, Riggs & Ingram has not just grown, but transformed. Now standing proudly among the top 25 firms in the U.S., our trajectory is steeped in innovation, shaping us into the firm of tomorrow—today. Our growth isn't merely a timeline; it's a testament to our entrepreneurial and pioneering spirit. As we harness cutting-edge technology and lead through industry evolution, our commitment to delivering actionable insights and solutions rooted in our founding principles of tailored Client service, Respect for all, and unyielding Integrity remains unwavering. As we look to the horizon, we at CRI are poised to redefine what's possible, and we invite our clients, old and new, to join us in shaping the future.

IT FIGURES: THE CRI PODCAST

Created to provide insight into the latest developments and regulations in the accounting and finance space, It Figures is an accounting and advisory focused podcast for business and organization leaders, entrepreneurs, and anyone who is looking to go beyond the status quo.

Listen on Apple Podcasts, Spotify, iHeart Radio, and more.
itfigurespodcast.com

Top 25 Accounting Firm - #1 Accounting Firm in the Gulf Coast Region

CRI CARR RIGGS & INGRAM®

accountingTODAY 2025 Top 100 Firms

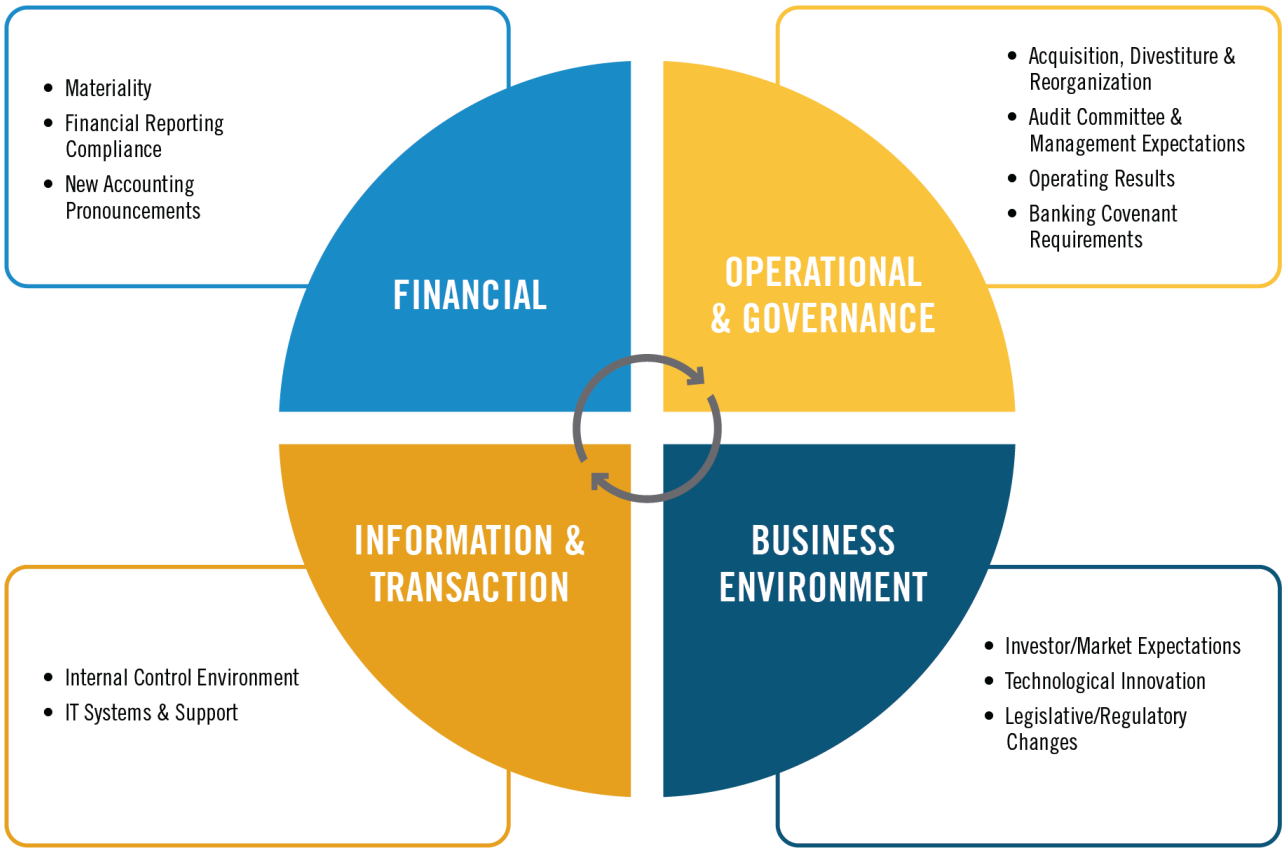
CRI AUDIT FRAMEWORK*

Our proposed services require a coordinated effort between us and The Groves of St. Lucie County Community Development District's team. Planning and continual communication are essential to developing the appropriate procedures, working collaboratively to resolve any identified issues, and meeting your timelines.

CRI's audit approach occurs within a framework of our client's business and industry; therefore, we assess risk by:

- Understanding management's perspectives and goals, and
- Considering business conditions and threats that could prevent management from achieving its business objectives.

We assess risks in the following areas:



CRI AUDIT FRAMEWORK*

Our ultimate intent is to drill down from these broad risks to specific financial reporting risks. We understand both these risks and management's processes and procedures for mitigating them (i.e. internal controls) in order to develop our procedures to carry out our audit responsibilities.

Although our audits are conducted through a structured, risk-based model, we focus on understanding the client's needs, requirements, and expectations. We work collaboratively with management and the Audit Committee (or similar function) to develop a communication and work plan to continuously improve client service, by doing so we help in moving your team from simple compliance to providing you with a competitive advantage.

In planning, we concentrate on "key risks," (items with a greater risk of a material misstatement, a material weakness in internal controls, or other matters resulting in the issuance of an inappropriate audit report). We focus on "material" items (i.e. those items that would be important to the user of your financial statements). When evaluating materiality of identified misstatements, certain quantitative and qualitative factors must be considered—which may include:

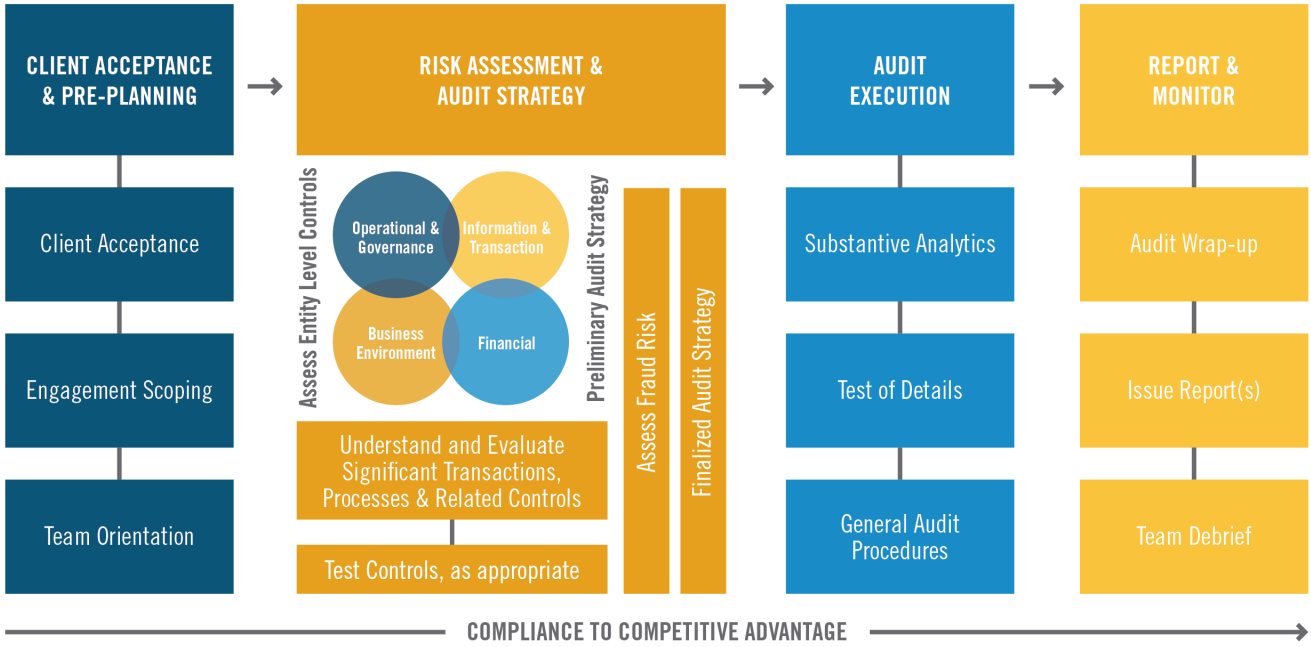
- Impact on operating trends (revenue/income, expenses, net income, etc).
- Nature of the misstatement (i.e., did the misstatement result from an unlawful transaction?).
- Impact on liquidity, capital/surplus, earnings capacity, etc.
- Impact to loan covenants and contractual and regulatory requirements.

Consistent communication is a key to completion of the audit. By ensuring constant involvement, we are in a better position to respond to your issues timely and efficiently. Therefore, we plan to meet with your management to:

- Set-up the audit by reviewing the mapping of The Groves of St. Lucie County Community Development District's financial information (financial statements and notes) to significant processes and IT systems to ensure that all significant account balances, transactions, procedures, and systems are tested as deemed necessary.
- Discuss ongoing changes—specifically new accounting pronouncements and key business transactions in their early stages, enabling us to agree on the resolution of various complex business issues on a timely basis.

CRI AUDIT APPROACH*

Our audit approach is a four stage approach, as depicted in the summary below. Our client acceptance and risk assessment procedures occur during detailed conversations and observations with your team. The results of those procedures allow us to tailor an audit program to your specific risks and needs. We then execute the audit, report the results, and evaluate continuous improvement opportunities for ongoing service and benefit to you.



CRI AUDIT APPROACH*

STAGE 1: CLIENT ACCEPTANCE & PRE-PLANNING

- Perform client acceptance procedures.
- Collaborate with management to agree to expectations and scope.
- Assign appropriate staff based on client needs and assessed risk.

STAGE 2: RISK ASSESSMENT & AUDIT STRATEGY

- Interview client personnel and others to understand client-specific objectives and risks.
- Assess following aspects of the organization for their impact on the audit plan:
  - environmental and other external risks,
  - management's fraud and IT risk assessment models,
  - entity level controls including:
    - control environment
    - risk assessment,
    - information and communication,
    - and monitoring controls.
  - IT General Computer (ITGC) controls, such as
    - IT Environment
    - Developing and Delivering IT, and
    - Operating and Monitoring IT.
- Determine materiality.
- Develop and document our understanding of and/or reliance on:
  - linkage of financial statements to:
    - significant transactions,
    - processes,
    - IT systems, and
    - related controls,
  - existence of/reliance on SOC entities and their reports,
  - internal audit, and
  - specialists (e.g. valuation, pension costs, etc.).
- If elected, test controls including ITGC, through a mix of:
  - inquiry,
  - observation
  - examination, and
  - re-performance.
- Perform preliminary analytical procedures.
- Finalize risk assessments and develop a final audit strategy.

STAGE 3: AUDIT EXECUTION

- Where possible to test as efficiently as possible:
  - develop detailed analytical procedures to use as substantive tests (benefit = reducing tests of details): Examples include:
    - ratio analysis,
    - regression analysis,
    - trend analysis,
    - predictive tests, or
    - reasonableness test,
  - utilize Computer-Assisted Audit Techniques (CAATs) (benefit = automation of testing for more coverage and less disruption to the client), and
  - perform targeted testing (also known as "coverage" testing) to test large portions of account balances (benefit = more coverage with smaller selections).
- Perform tests of details, including sampling.
- Perform general audit procedures such as tests related to:
  - commitments and contingencies,
  - legal letters,
  - management representations,
  - reviews of Board minutes,
  - related party transactions,
  - debt covenants, and
  - going concern.
- Perform other tests for compliance such as Yellow Book or Single Audit tests.

STAGE 4: REPORT & MONITOR

- Continually monitor throughout the audit - providing feedback as agreed during scoping.
- Conclude the audit (i.e. issue opinions and reports).
- Develop and present:
  - reports,
  - required communications,
  - management letter comments, and
  - other audit-related deliverables.
- Perform debriefings to identify opportunities for improvement with our:
  - engagement team, and/or
  - client's team.

APPENDIX A - RFP DOCUMENTS

DEL WEBB EXPLORE NORTH RIVER RANCH COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS FOR ANNUAL AUDIT SERVICES

The Del Webb Explore North River Ranch Community Development District hereby requests proposals for annual financial auditing services. The proposal must provide for the auditing of the District's financial records for the fiscal year ending September 30, 2026, with an option for additional annual renewals, subject to mutual agreement by both parties. The District is a local unit of special-purpose government created under Chapter 190, *Florida Statutes*, for the purpose of financing, constructing, and maintaining public infrastructure. The District is located in Manatee County, Florida, and has an annual operating budget of approximately $81,619. The final contract will require that, among other things, the audit for the fiscal year ending September 30, 2026, be completed no later than June 30, 2027.

The auditing entity submitting a proposal must be duly licensed under Chapter 473, *Florida Statutes*, and be qualified to conduct audits in accordance with "Government Auditing Standards," as adopted by the Florida Board of Accountancy. Audits shall be conducted in accordance with Florida Law and particularly Section 218.39, *Florida Statutes*, and the rules of the Florida Auditor General.

Proposal packages, which include evaluation criteria and instructions to proposers, are available from the District Manager at the address and telephone number listed below.

Proposers must provide one (1) electronic and one (1) unbound copy of their proposal to the District Manager, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431, (561) 571-0010 in an envelope marked on the outside "Auditing Services, Del Webb Explore North River Ranch Community Development District." Proposals must be received by 12:00 p.m. on January 20, 2026, at the office of the District Manager. Please direct all questions regarding this Notice to the District Manager.

Kristen Suit
District Manager

Del Webb Explore North River Ranch Community Development District

Request for Proposals

District Auditing Services for Fiscal Year 2026
Manatee County, Florida

INSTRUCTIONS TO PROPOSERS

SECTION 1. DUE DATE. Sealed proposals must be received no later than January 20, 2026 at 12:00 p.m., at the offices of District Manager, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431, (561) 571-0010. Proposals will be publicly opened at that time.

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

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

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

SECTION 5. SUBMISSION OF PROPOSAL. Submit one (1) electronic and one (1) unbound copy of the Proposal Documents, and other requested attachments at the time and place indicated herein, which shall be enclosed in an opaque sealed envelope, marked with the title "Auditing Services – Del Webb Explore North River Ranch Community Development District" on the face of it. **Pricing for each additional bond issuance is required.**

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

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

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

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

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

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

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

A. List the position or title of all personnel to perform work on the District audit. Include resumes for each person listed; list years of experience in present position for each party listed and years of related experience.

B. Describe proposed staffing levels, including resumes with applicable certifications.

C. Three references from projects of similar size and scope. The Proposer should include information relating to the work it conducted for each reference as well as a name, address and phone number of a contact person.

D. The lump sum cost of our provision of the services under the proposal for the District's first audit for which there are no special assessment bonds, plus the lump sum cost of two (2) annual renewals, which renewals shall include services related to the District's anticipated issuance of special assessment bonds.

SECTION 13. PROTESTS. In accordance with the District's Rules of Procedure, any protest regarding the Proposal Documents, must be filed in writing, at the offices of the

District Manager, within seventy-two (72) calendar hours (excluding Saturday, Sunday, and state holidays) after the receipt of the Proposal Documents. The formal protest setting forth with particularity the facts and law upon which the protest is based shall be filed within seven (7) calendar days (including Saturday, Sunday, and state holidays) after the initial notice of protest was filed. Failure to timely file a notice of protest or failure to timely file a formal written protest shall constitute a waiver of any right to object or protest with respect to the aforesaid Proposal Documents.

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

DEL WEBB EXPLORE NORTH RIVER RANCH COMMUNITY DEVELOPMENT DISTRICT
AUDITOR SELECTION
EVALUATION CRITERIA

1. ***Ability of Personnel.*** **(20 Points)**

(E.g., geographic location of the firm's headquarters or permanent office in relation to the project; capabilities and experience of key personnel; present ability to manage this project; evaluation of existing work load; proposed staffing levels, etc.)

2. ***Proposer's Experience.*** **(20 Points)**

(E.g., past record and experience of the Proposer in similar projects; volume of work previously performed by the firm; past performance for other or current Community Development District(s) in other contracts; character, integrity, reputation of Proposer, etc.)

3. ***Understanding of Scope of Work.*** **(20 Points)**

Extent to which the proposal demonstrates an understanding of the District's needs for the services requested.

4. ***Ability to Furnish the Required Services.*** **(20 Points)**

Extent to which the proposal demonstrates the adequacy of Proposer's financial resources and stability as a business entity necessary to complete the services required.

5. ***Price.*** **(20 Points)*****

Points will be awarded based upon the lowest total proposal for rendering the services and the reasonableness of the proposal.

Total **(100 Points)**

***Alternatively, the Board may choose to evaluate firms without considering price, in which case the remaining categories would be assigned 25 points each.

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

11CIII

Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

Proposal to Provide Financial Auditing Services:

THE GROVES OF ST. LUCIE COUNTY
COMMUNITY DEVELOPMENT DISTRICT

Proposal Due: February 18, 2026
12:00PM

Submitted to:
The Groves of St. Lucie County
Community Development District
c/o District Manager
2300 Glades Road, Suite 410W
Boca Raton, Florida 33431

Submitted by:
Antonio J. Grau, Partner
Grau & Associates
1001 W. Yamato Road, Suite 301
Boca Raton, Florida 33431
Tel (561) 994-9299
Fax (561) 994-5823
tgrau@graucpa.com
www.graucpa.com

Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

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Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

February 18, 2026

The Groves of St. Lucie County Community Development District
c/o District Manager
2300 Glades Road, Suite 410W
Boca Raton, Florida 33431

Re: Request for Proposal for Professional Auditing Services for the fiscal year ended September 30, 2025, with an option for four (4) additional annual renewals.

Grau & Associates (Grau) welcomes the opportunity to respond to The Groves of St. Lucie County Community Development District's (the "District") Request for Proposal (RFP), and we look forward to working with you on your audit. We are an energetic and robust team of knowledgeable professionals and are a recognized leader of providing services to Community Development Districts. As one of Florida's few firms to primarily focus on government, we are especially equipped to provide you an effective and efficient audit.

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

Why Grau & Associates:

Knowledgeable Audit Team

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

Servicing your Individual Needs

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

Developing Relationships

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

Maintaining an Impeccable Reputation

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

Complying With Standards

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

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

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

Very truly yours,
Grau & Associates

Antonio J. Grau

Firm Qualifications

Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

Grau's Focus and Experience

Our Team

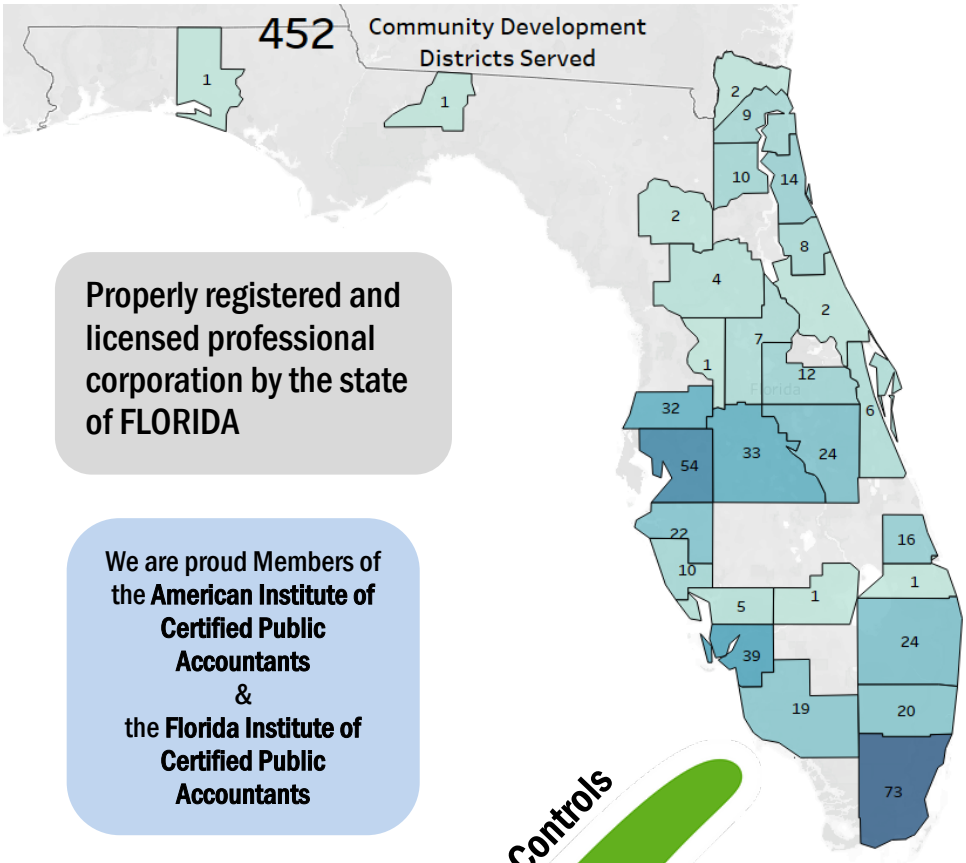
3 Partners

13 Professional Staff

2 Administrative Professionals

2005

Year founded



Properly registered and licensed professional corporation by the state of FLORIDA

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

Services Provided

⇒ External quality review program: consistently receives a pass

⇒ Internal: ongoing monitoring to maintain quality

AICPA | FICPA | GFOA | FASD | FGFOA

See next page for report and certificate

FICPA
Florida Institute of Certified Public Accountants

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

November 18, 2025

Antonio Grau
Grau & Associates
1001 W. Yamato Road, Suite 301
Boca Raton, FL 33431-4403

Dear Antonio Grau:

It is my pleasure to notify you that on November 18, 2025, the Florida Peer Review Committee accepted the report on the most recent System Review of your firm. The due date for your next review is December 31, 2028. This is the date by which all review documents should be completed and submitted to the administering entity.

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

Thank you for your cooperation.

Sincerely,

FICPA Peer Review Committee

Peer Review Team
FICPA Peer Review Committee
paul@ficpa.org
850.224.2727, x5957

cc: Daniel Hevia, David Caplivski

Firm Number: 900004390114 Review Number: 616829

PGP
PRIDA, GUIDA & PEREZ, P.A.
CERTIFIED PUBLIC ACCOUNTANTS
2504 W. KATHLEEN STREET
TAMPA, FLORIDA 33607
TELEPHONE: (813) 226-6091
FAX: (813) 229-7754

Report on the Firm's System of Quality Control

October 3, 2025

To the Partners of Grau & Associates
And the Peer Review Committee of the
Florida Institute of Certified Public Accountants

We have reviewed the system of quality control for the accounting and auditing practice of Grau & Associates (the firm), in effect for the year ended June 30, 2025. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants (Standards).

A summary of the nature, objectives, scope, limitations of, and the procedures performed in a system review as described in the Standards may be found at www.aicpa.org/prsummary. The summary also includes an explanation of how engagements identified as not performed or reported on conformity with applicable professional standards, if any, are evaluated by a peer reviewer to determine a peer review rating.

Firm's Responsibility

The firm is responsible for designing and complying with a system of quality control to provide the firm with reasonable assurance of performing and reporting in conformity with the requirements of applicable professional standards in all material respects. The firm is also responsible for evaluating actions to promptly remediate engagements deemed as not performed or reported on conformity with the requirements of applicable professional standards, when appropriate, and for remediating weaknesses in its system of quality control, if any.

Peer Reviewer's Responsibility

Our responsibility is to express an opinion on the design of and compliance with the firm's system of quality control based on our review.

Required Selections and Considerations

Engagements selected for review included engagements performed under *Government Auditing Standards*, including compliance audits under the Single Audit Act.

As a part of our peer review, we considered reviews by regulatory entities as communicated by the firm, if applicable, in determining the nature and extent of our procedures.

Opinion

In our opinion, the system of quality control for the accounting and auditing practice of Grau & Associates in effect for the year ended June 30, 2025, has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of *pass, pass with deficiency(ies),* or *fail*. Grau & Associates has received a peer review rating of *pass*.

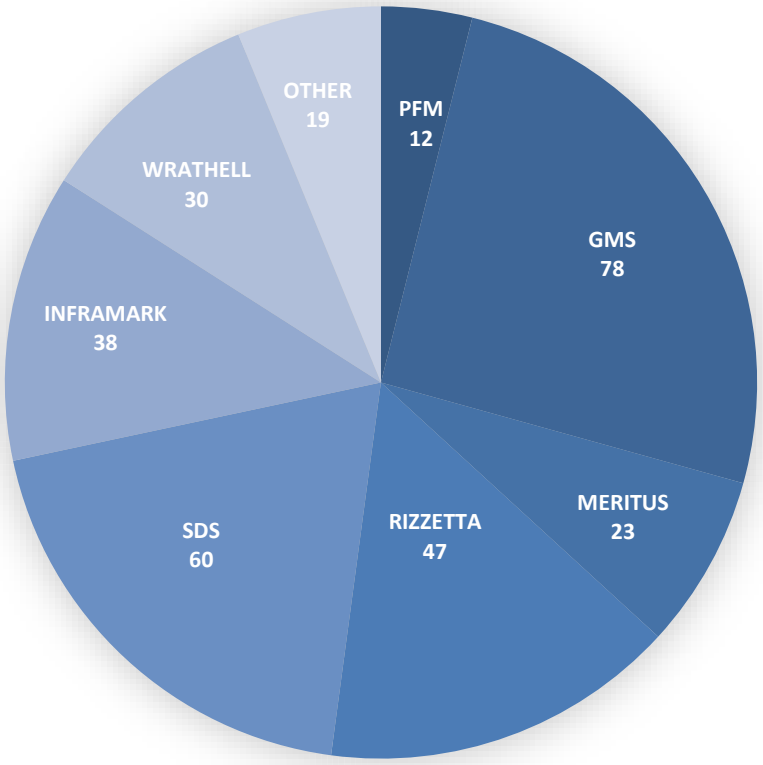
Prida Guida & Perez, P.A.

MEMBER AMERICAN INSTITUTE OF CERTIFIED PUBLIC ACCOUNTANTS
MEMBER FLORIDA INSTITUTE OF CERTIFIED PUBLIC ACCOUNTANTS

Firm & Staff Experience

Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

GRAU AND ASSOCIATES COMMUNITY DEVELOPMENT DISTRICT EXPERIENCE BY MANAGEMENT COMPANY



Profile Briefs:

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

Ben Steets, CPA (Partner)
Years Performing Audits: 9+
CPE (last 2 years): Government Accounting, Auditing: 24 hours; Accounting, Auditing and Other: 64 hours
Professional Memberships: AICPA, FICPA, FGFOA, FASD

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

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

YOUR ENGAGEMENT TEAM

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

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

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

Antonio 'Tony 'J. Grau, CPA
Partner

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

Experience

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

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

Education

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

Clients Served (partial list)

(>300) Various Special Districts, including:

Bayside Improvement Community Development District
Dunes Community Development District
Fishhawk Community Development District (I, II, IV)
Grand Bay at Doral Community Development District
Heritage Harbor North Community Development District
St. Lucie West Services District
Ave Maria Stewardship Community District
Rivers Edge II Community Development District
Bartram Park Community Development District
Bay Laurel Center Community Development District

Boca Raton Airport Authority
Greater Naples Fire Rescue District
Key Largo Wastewater Treatment District
Lake Worth Drainage District
South Indian River Water Control

Professional Associations/Memberships

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

Professional Education *(over the last two years)*

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

Ben Steets, CPA, *Partner*

Contact : bsteets@graucpa.com / (561) 939-6669

Experience

Grau & Associates	Partner	2023-Present
Grau & Associates	Manager	2021-2023
Grau & Associates	Senior Auditor	2018-2021
Grau & Associates	Staff Auditor	2016-2018
PCAOB Registered Firm	Staff Auditor	2015-2016

Education

Florida Atlantic University (2015)

Clients Served *(partial list)*

(>300) Various Special Districts	San Carlos Park Fire and Rescue Service District
Careersource Polk	Sanibel Fire and Rescue District
Central Broward Water Control District	South Broward Drainage District
Dunes Community Development District	South Trail Fire and Rescue District
Greater Naples Fire Rescue District	Town of Highland Beach
Key Marco Community Development District	Town of Lauderdale-By-The-Sea
Lake Worth Drainage District	Verano Walk Community Development District
Mae Volen Senior Center	West Villages Improvement District
Port of the Islands Community Improvement District	Winding Cypress Community Development District

Professional Education (*over the last two years*)

Course	**Hours**
Government Accounting and Auditing	28
Accounting, Auditing and Other	88
Total Hours	116 (includes 4 hours of Ethics CPE)

Professional Associations/Memberships

American Institute of Certified Public Accountants
Florida Institute of Certified Public Accountants

References

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

Dunes Community Development District

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

Two Creeks Community Development District

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

Journey's End Community Development District

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

Specific Audit Approach

Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

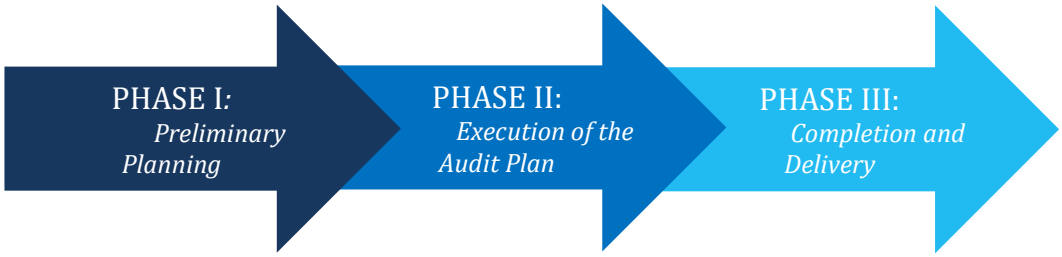
AUDIT APPROACH

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

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

Proposed segmentation of the engagement

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



Phase I - Preliminary Planning

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

During this phase we will perform the following activities:

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

Phase II – Execution of Audit Plan

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

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

Phase III - Completion and Delivery

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

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

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

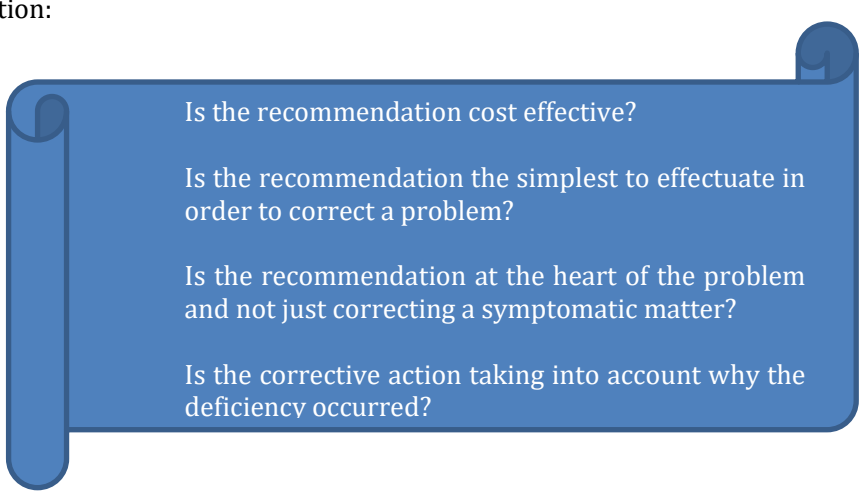
Application of this approach in developing our management letter is particularly important given the increasing financial pressures and public scrutiny facing today's public officials. We will prepare the management letter at the completion of our final procedures.

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

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

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

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



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

Communications

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

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

Cost of Services

Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

Our proposed all-inclusive fees for the financial audit for the fiscal years ended September 30, 2025-2029 are as follows:

Year Ended September 30,	Fee
2025	$2,500
2026	$2,600
2027	$2,700
2028	$2,800
2029	$2,900
TOTAL (2025-2029)	**$13,500**

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

Supplemental Information

Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

PARTIAL LIST OF CLIENTS

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

ADDITIONAL SERVICES

CONSULTING / MANAGEMENT ADVISORY SERVICES

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

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

ARBITRAGE

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

73 Current Arbitrage Calculations

We look forward to providing The Groves of St. Lucie County Community Development District with our resources and experience to accomplish not only those minimum requirements set forth in your Request for Proposal, but to exceed those expectations!

For even more information on Grau & Associates please visit us on www.graucpa.com.

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

11D

THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT

AUDITOR EVALUATION MATRIX

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

NOTES:

Completed by: _____ Date: _____

Board Member's Signature

_____

Printed Name of Board Member

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

14

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

14A

USA TODAY CO.

LocaliQ

PO Box 631244 Cincinnati, OH 45263-1244

AFFIDAVIT OF PUBLICATION

Ruth Viola
The Groves of St Lucie County CDD
2300 Glades RD
Suite 410W
Boca Raton FL 33431-7386

STATE OF WISCONSIN, COUNTY OF BROWN

Before the undersigned authority personally appeared, who on oath says that he or she is the Legal Advertising Representative of the Indian River Press Journal/St Lucie News Tribune/Stuart News, newspapers published in Indian River/St Lucie/Martin Counties, Florida; that the attached copy of advertisement, being a Legal Ad in the matter of Govt Bids & Proposals, was published on the publicly accessible websites of Indian River/St Lucie/Martin Counties, Florida, or in a newspaper by print in the issues of, on:

SCN StLucie-IndianRv-Stuart 02/10/2026
SCN tcpalm.com 02/10/2026

Affiant further says that the website or newspaper complies with all legal requirements for publication in chapter 50, Florida Statutes.
Subscribed and sworn to before me, by the legal clerk, who is personally known to me, on 02/10/2026

Legal Clerk

Notary, State of WI, County of Brown

9-3-29

My commission expires

Publication Cost:	$245.04	
Tax Amount:	$0.00	
Payment Cost:	$245.04	
Order No:	12069660	# of Copies:
Customer No:	1499243	1
PO #:	RFQ for Eng Srv	

THIS IS NOT AN INVOICE!

Please do not use this form for payment remittance.

KONGMENG YANG
Notary Public
State of Wisconsin

REQUEST FOR QUALIFICATIONS FOR ENGINEERING SERVICES FOR THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT

RFQ for Engineering Services

The Groves of St. Lucie County Community Development District (**"District"**), located in St. Lucie County, Florida, announces that professional engineering services will be required on a continuing basis for the District's stormwater systems, and other public improvements authorized by Chapter 190, Florida Statutes. The engineering firm selected will act in the general capacity of District Engineer and will provide District engineering services, as required.

Any firm or individual (**"Applicant"**) desiring to provide professional services to the District must: 1) hold applicable federal, state and local licenses; 2) be authorized to do business in Florida in accordance with Florida law; and 3) furnish a statement (**"Qualification Statement"**) of its qualifications and past experience on U.S. General Service Administration's "Architect-Engineer Qualifications, Standard Form No. 330," with pertinent supporting data. Among other things, Applicants must submit information relating to: a) the ability and adequacy of the Applicant's professional personnel; b) whether the Applicant is a certified minority business enterprise; c) the Applicant's willingness to meet time and budget requirements; d) the Applicant's past experience and performance, including but not limited to past experience as a District Engineer for any community development districts and past experience in St. Lucie County, Florida; e) the geographic location of the Applicant's headquarters and offices; f) the current and projected workloads of the Applicant; and g) the volume of work previously awarded to the Applicant by the District. Further, each Applicant must identify the specific individual affiliated with the Applicant who would be handling District meetings, construction services, and other engineering tasks.

The District will review all Applicants and will comply with Florida law, including the Consultant's Competitive Negotiations Act, Chapter 287, Florida Statutes (**"CCNA"**). All Applicants interested must submit one (1) electronic and one (1) unbound copy of Standard Form No. 330 and the Qualification Statement by 12:00 p.m., on February 25, 2026 by email to gillyardd@whhassociates.com (**"District Manager's Office"**).

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

The District reserves the right to reject any and all Qualification Statements. Additionally, there is no express or implied obligation for the District to reimburse Applicants for any expenses associated with the preparation and submittal of the Qualification Statements in response to this request.

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

TCN-12069660 02/10/26

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

14B

REQUEST FOR QUALIFICATIONS FOR ENGINEERING SERVICES
FOR THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT

RFQ for Engineering Services

The Groves of St. Lucie County Community Development District ("**District**"), located in St. Lucie County, Florida, announces that professional engineering services will be required on a continuing basis for the District's stormwater systems, and other public improvements authorized by Chapter 190, *Florida Statutes*. The engineering firm selected will act in the general capacity of District Engineer and will provide District engineering services, as required.

Any firm or individual ("**Applicant**") desiring to provide professional services to the District must: 1) hold applicable federal, state and local licenses; 2) be authorized to do business in Florida in accordance with Florida law; and 3) furnish a statement ("**Qualification Statement**") of its qualifications and past experience on U.S. General Service Administration's "Architect-Engineer Qualifications, Standard Form No. 330," with pertinent supporting data. Among other things, Applicants must submit information relating to: a) the ability and adequacy of the Applicant's professional personnel; b) whether the Applicant is a certified minority business enterprise; c) the Applicant's willingness to meet time and budget requirements; d) the Applicant's past experience and performance, including but not limited to past experience as a District Engineer for any community development districts and past experience in St. Lucie County, Florida; e) the geographic location of the Applicant's headquarters and offices; f) the current and projected workloads of the Applicant; and g) the volume of work previously awarded to the Applicant by the District. Further, each Applicant must identify the specific individual affiliated with the Applicant who would be handling District meetings, construction services, and other engineering tasks.

The District will review all Applicants and will comply with Florida law, including the Consultant's Competitive Negotiations Act, Chapter 287, *Florida Statutes* ("**CCNA**"). All Applicants interested must submit one (1) electronic and one (1) unbound copy of Standard Form No. 330 and the Qualification Statement by 12:00 p.m., on February 25, 2026 by email to gillyardd@whhassociates.com ("**District Manager's Office**").

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

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

Applicants for any expenses associated with the preparation and submittal of the Qualification Statements in response to this request.

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

THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT

DISTRICT ENGINEER PROPOSALS

COMPETITIVE SELECTION CRITERIA

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

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

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

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

3) **Geographic Location (Weight: 20 Points)**

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

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

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

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

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

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

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

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

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

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

14C

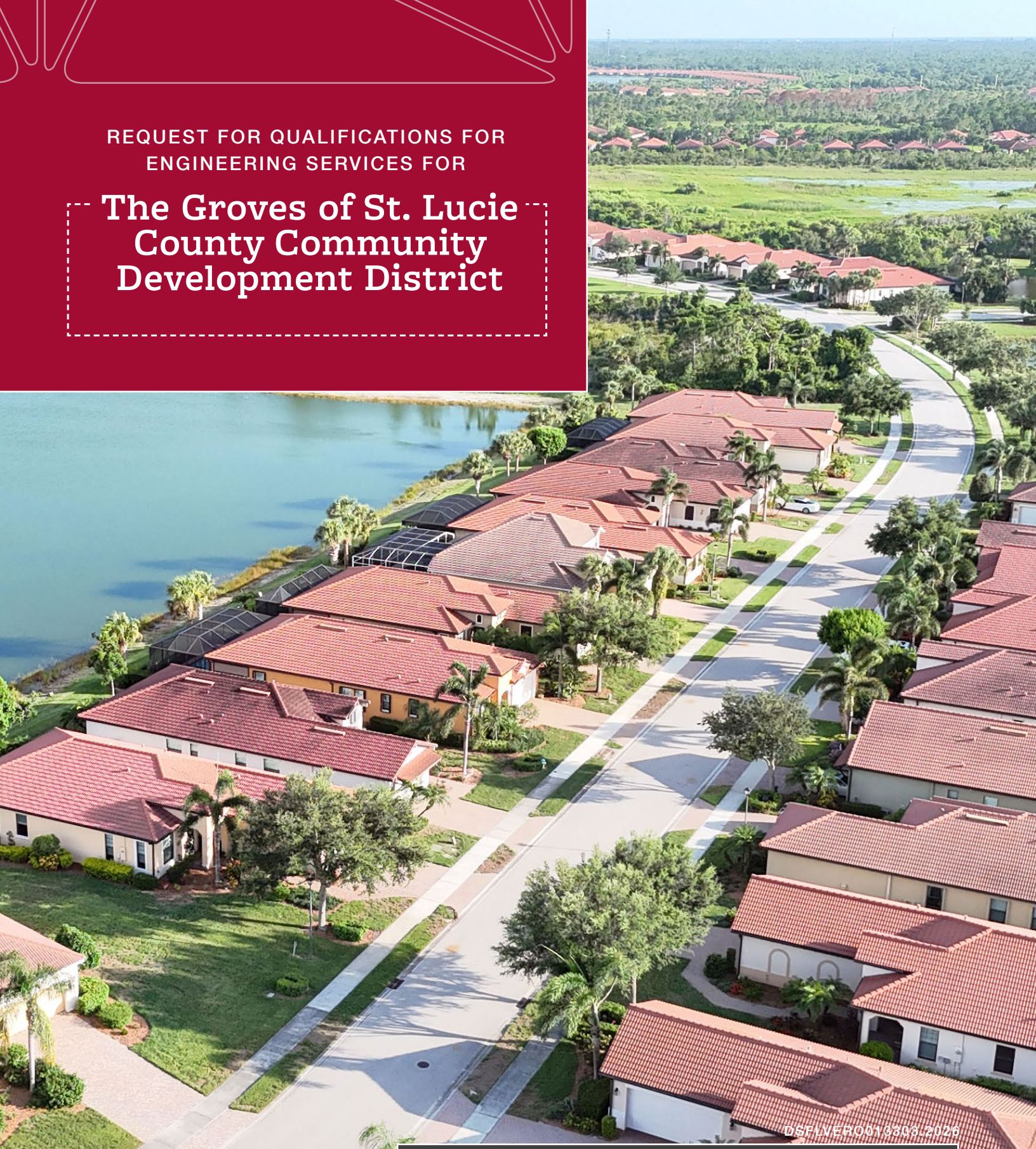
THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

14CI

REQUEST FOR QUALIFICATIONS FOR
ENGINEERING SERVICES FOR

The Groves of St. Lucie County Community Development District



DSFLVERO013303.2026

Prepared For:
THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT

Prepared By:
Kimley»Horn
Expect More. Experience Better.

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Kimley»Horn

ABILITY AND ADEQUACY OF PROFESSIONAL PERSONNEL

The District needs a consultant team that can navigate the responsibilities and challenges presented in this contract with a clear, visionary approach, as well as a proactive partner who is familiar with the area. Kimley-Horn's experience with community development districts (CDDs) and St. Lucie County provides you with unmatched service, responsiveness, and essential local knowledge. Outlined below are the qualifications of our key project team members.

ALEXANDER M. DAUGHERTY, PE

Project Manager | CDD Engineer

Alex is a professional civil engineer with more than nine years of experience providing land development and site civil engineering services throughout the state of Florida. He has experience supporting large-scale residential communities, commercial projects, and mixed-use developments. His work includes a broad range of site civil design responsibilities such as site layout, stormwater management, erosion and sedimentation control design and inspection, ADA accessibility, utility system design, agency permitting, and construction-phase services. As the project manager, Alex will be handling District meetings, construction, and other engineering tasks.

KINAN F. HUSAINY, PE

Civil Engineer

Kinan has more than 19 years of civil engineering experience. He has extensive experience in the design and project management of large-scale residential communities, commercial projects, and mixed-use developments. Kinan is well-versed in the specific requirements for both multifamily developments and single-family communities. His specific areas of engineering expertise include land development, grading, stormwater management, water and sewer systems, site layout, permitting, utility system design, dewatering, construction phasing, and value engineering.

BENJAMIN NUNEZ, EI

Engineering Analyst

Benjamin Nunez is a civil engineering professional with three years of experience providing land development and site civil engineering services in Florida. He has supported large-scale residential and luxury community developments, with experience on projects ranging from several hundred to over 2,000 acres. His work includes preparation of construction documents, cost estimates, and engineering calculations, as well as site civil design tasks such as paving, grading, and drainage plans; stormwater management; erosion and sedimentation control; and private water and wastewater utility systems. Benjamin also has experience with agency coordination, permitting, and construction-phase services.

MICHAEL PROCKO

Technical Support

Michael is an experienced civil engineering professional with over 30 years of experience in site civil and roadway design services for public and private sector projects throughout Florida. He has supported residential, commercial, and infrastructure projects, contributing to developments ranging from large master planned communities to roadway, drainage, and utility improvements. His experience includes CADD design support for site layout, grading, drainage, stormwater management, utility systems, roadway improvements, environmental assessments, agency permitting, and construction phase servicess.

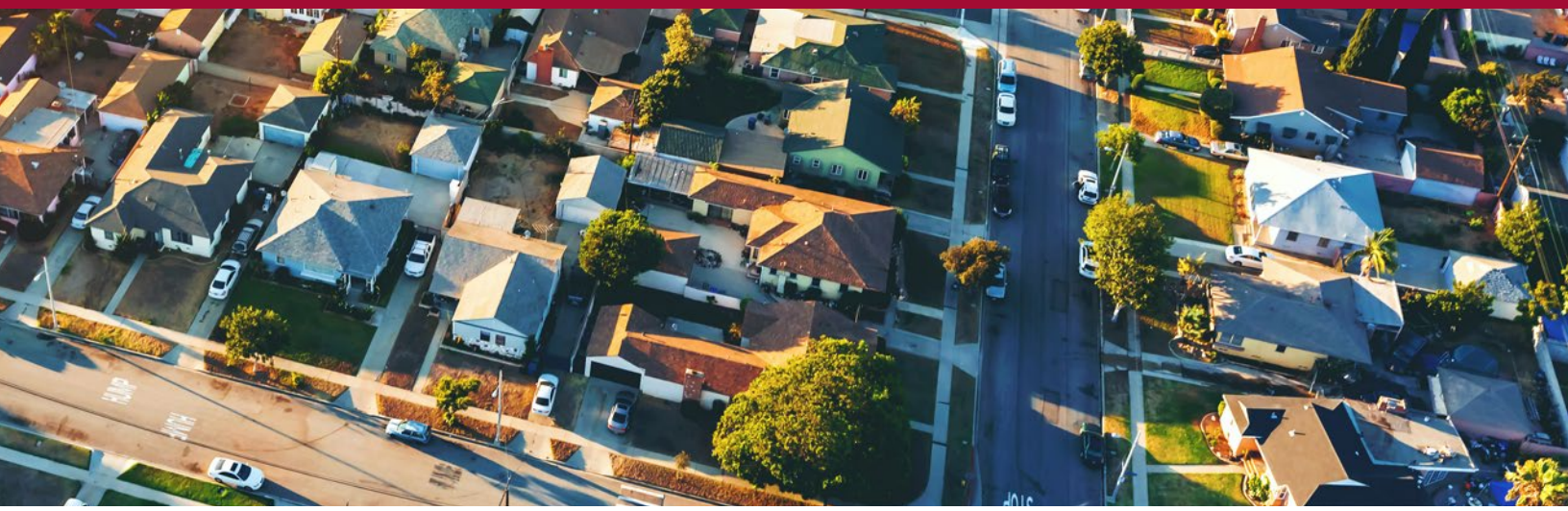
JT LAPERNA

Administrative Support

JT is an administrative professional with over 40 years of experience supporting project teams through a wide range of contract, correspondence, and project submittal functions. She plays a key role in coordinating meeting schedules, arranging travel, and managing proposal production efforts. Janice also works closely with marketing staff and practice teams to maintain and enhance the integrity of the Deltek Vision database, which houses internal project and employee records.

Individual resumes for each of our key staff members can be found in Part I, Section E of the Standard Form 330 at the end of this qualifications package.

SECTION II



CONSULTANT'S PAST PERFORMANCE

ST. LUCIE COUNTY EXPERIENCE

Kimley-Horn has remained steadfast in upholding the core values that have defined our firm for the past 59 years. We know the value and importance of staying true to our roots, focusing on our local municipal clients, and delivering the personalized and responsive service they deserve. Having served St. Lucie County for more than two decades, we are familiar with your standards and will operate as an extension of County staff, easing the burdens on your time. Our local team is accessible for staff meetings and work sessions on short notice and offer extensive knowledge of local conditions.

PAST PERFORMANCE FOR COMMUNITY DEVELOPMENT DISTRICTS

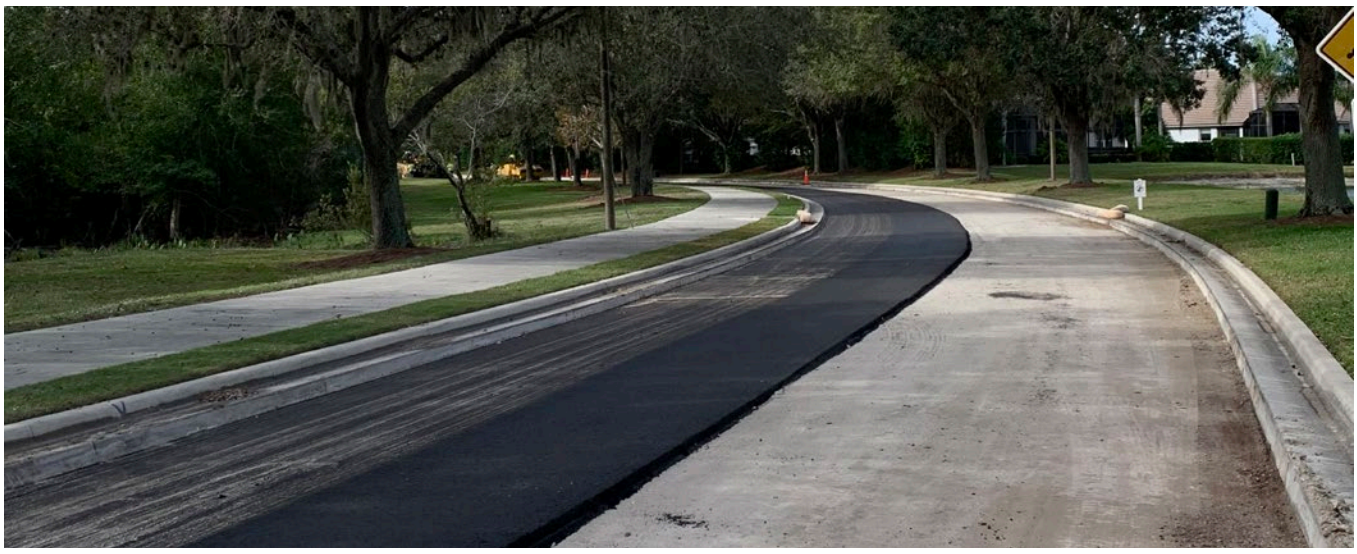
Kimley-Horn provides urban and development planning and landscape architectural services for a wide variety of public and private clients throughout Florida and the United States. Throughout our 59-year history, we have served numerous local governments in Florida and are proud of the role we play in shaping the development, and in many cases, the redevelopment of Florida's communities. A hallmark of our services to clients is our ability to provide a full range of services for a multitude of urban and transportation planning and public infrastructure improvements. Our multi-disciplined teams can take your projects from inception through implementation—all while keeping your initial goals for your projects at the forefront of each step of the process.

A few examples of our range of services include:

- Helping two new communities develop their first comprehensive plan
- Assisting several communities with their evaluation and appraisal reports and related comprehensive plan amendments
- Helping initiate regional activity centers and transportation concurrency exception areas
- Teaming with developers and communities to develop design guidelines for specific projects
- Site plan review, traffic, and other concurrency reviews
- Engaging the public in design, visioning, and transportation workshops and charrettes for several communities
- Performing traffic studies and transportation planning including a transit-oriented design feasibility study, transportation master plans, transportation concurrency management database, and multiple parking and downtown parking garage studies

COMMUNITY DEVELOPMENT DISTRICTS KIMLEY-HORN HAS SERVED IN FLORIDA:

- Westridge CDD – Polk County, FL
- Victor Posner City Center CDD – Polk County, FL
- Oakmont Grove CDD – Polk County, FL
- Hawthorne Mill CDD – Lakeland, FL
- Fox Branch Ranch CDD – Lakeland, FL
- Boca Royale CDD – Sarasota, FL
- Lakewood Ranch CDD – Sarasota, FL
- Blackburn CDD – Sarasota, FL
- Central Parc CDD – Sarasota, FL
- Coastal Lake CDD – Walton, FL
- Grove Resort CDD – Winter Garden, FL
- Miami World Center CDD – Miami, FL
- Sumter Landing CDD – The Villages, FL
- Premium Point CDD – St. Augustine, FL
- Reserve CDD – Port St. Lucie, FL
- Rivington CDD – Debary, FL
- The District CDD – Jacksonville, FL
- Mills Park CDD – Orlando, FL
- Bonnet Creek CDD – Winter Park, FL
- Bayi CDD – Ocala, FL
- Bay Laurel Center CDD – Ocala, FL
- Coastal Lake CDD – Panama City Beach, FL
- The Villages CDD – The Villages, FL
- Village Center CDD – The Villages, FL
- Midtown Miami CDD – Miami, FL
- Sumter Landing CDD – The Villages, FL
- Mayfair CDD – Lake Wales, FL
- Kenmare at Lake Annie CDD – Dundee, FL
- Greyhawk Landing CDD – Manatee County, FL
- Waterlefe CDD – Sarasota, FL
- Venetian CDD – Sarasota, FL
- Blackburn Creek CDD – Sarasota, FL
- Highlands CDD – Hillsborough County, FL
- Mills & Nebraska CDD – Orlando, FL
- Cottages Silver Oaks CDD – Zephyrhills, FL
- Boynton Village CDD – Boynton Beach, FL
- Sarasota National CDD – Sarasota, FL
- Stoneybrook at Venice CDD – Sarasota, FL
- Tara CDD – Bradenton, FL
- Legends Bay CDD – Sarasota, FL
- Beacon Lakes CDD – Miami, FL
- Manatee River CDD – Bradenton, FL
- Arbor Greene CDD – Tampa, FL
- Cross Creek CDD – Bradenton, FL
- Veranda CDD – Port St. Lucie, FL
- Parkland Preserve CDD – St. Augustine, FL
- Winding Oaks CDD – Ocala, FL
- River Road at Center Road CDD – Sarasota, FL



SECTION III

GEOGRAPHIC LOCATION

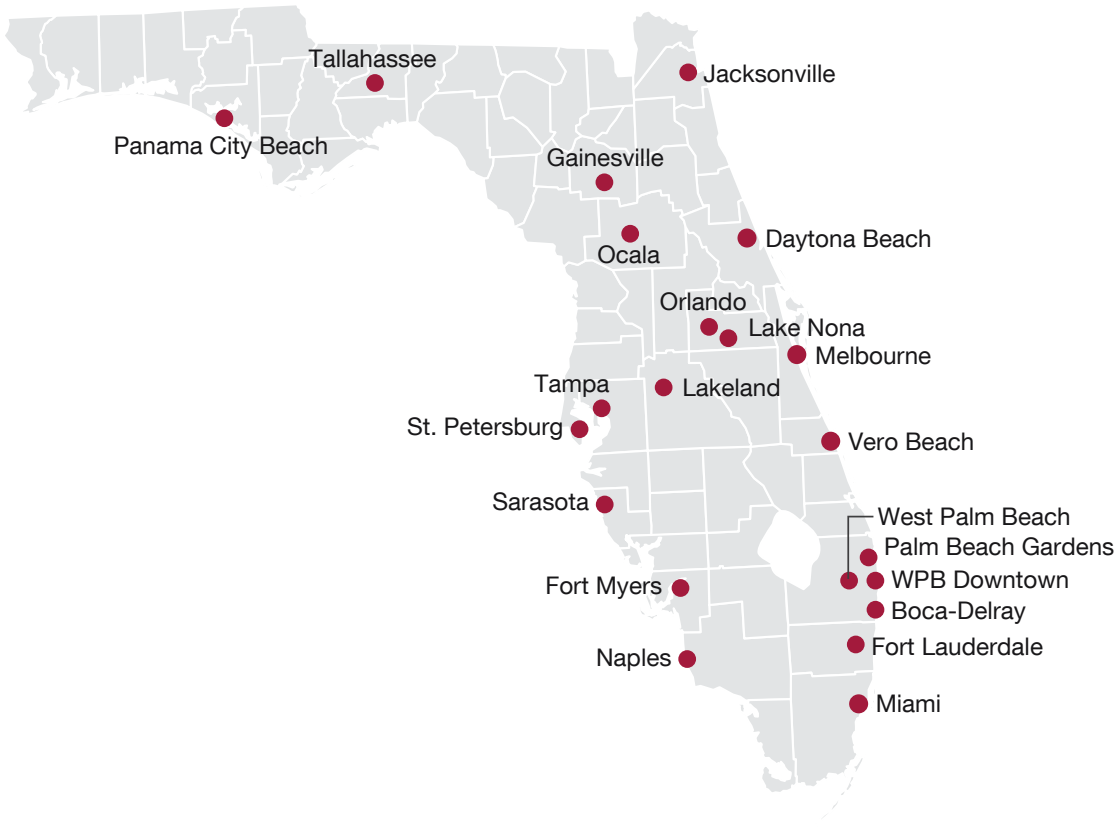
Kimley-Horn's Vero Beach office will serve as the primary office responsible for overseeing the work related to this project. In addition, we have the ability to call upon our nationwide partners for assistance, offering the resources of a large, nationally ranked firm with the personal attention and response of a dedicated, local professional team.

OUR VERO BEACH OFFICE IS LOCATED AT:

445 24th Street, Suite 200
Vero Beach, FL 32960
772.794.4100

KIMLEY-HORN'S CORPORATE HEADQUARTERS ARE LOCATED AT:

One Bank of America Plaza
421 Fayetteville Street,
Suite 600
Raleigh, NC 27601
919.677.2000



SECTION IV

WILLINGNESS TO MEET TIME AND BUDGET REQUIREMENTS

Kimley-Horn has a proven record of performing on time and within budget. The key to our success is managing the right resources at the right time. We emphasize project management using bi-monthly effort reports that give our project managers up-to-date staffing and expense information related to their projects. This information enables them to continuously monitor the status of project cost, cost control effectiveness, and schedule. Kimley-Horn often schedules bi-monthly telephone meetings with our clients to communicate the project's progress.

Frequent communication and a clear definition of the responsibilities of team members are critical elements in maintaining schedules. With that in mind, our project-specific work plan identifies critical project milestones and deliverable dates. We will then actively manage our team resources to meet the agreed-upon schedules and keep your project on track.

Our project manager, **Alexander M. Daugherty, PE** will have the authority to allocate resources and troubleshoot difficulties. We pledge to view the project from your perspective, examine issues in a strategic context, and provide you with tactical solutions.

SECTION V

CERTIFIED MINORITY BUSINESS ENTERPRISE

Although Kimley-Horn is not a certified minority business, we have company policy of meeting or exceeding our clients' minority business participation goals. Through corporate policies and philosophy, our firm actively seeks to encourage and promote the use of MBE/WBE firms. We provide interested minority firms/women owned firms with the opportunity to serve as subconsultants on our teams and we actively seek to increase our large database of qualified MBE/WBE firms for use on future projects. Our aggressive MBE/WBE utilization policy ensures that Kimley-Horn is consistently furthering the positive economic development momentum advocated by the state of Florida using minority/women-owned businesses.

Our performance in using minority firms from 2020-2024 is as follows:

YEAR	TOTAL PAID
2024	$123.2 million
2023	$93.9 million
2022	$71.1 million
2021	$54.6 million
2020	$54.5 million

SECTION VI

RECENT, CURRENT AND PROJECTED WORKLOADS

Kimley-Horn is very progressive when it comes to understanding its current and projected workload and has a long history of achieving successful project completion through a combination of effective project management and technical expertise. Consequently, Kimley-Horn is committed to providing the District with the highest quality staff and service to meet your project schedule and budget requirements. The members of our project team were selected using two criteria: (1) their experience with similar projects and (2) their availability to assume major technical responsibilities.

Based on a review of our workload forecasting program called “Castaheads,” we can assure you that the staff members selected for this team are available to serve you and are in an excellent position to handle the workload of this assignment. When work is assigned to us, our cast-ahead system will ensure staff availability to successfully complete our assignments. While not all staff assigned to this project will be required full time, they will be fully committed whenever their expertise is needed.

VOLUME OF WORK PREVIOUSLY AWARDED TO CONSULTANT BY DISTRICT

The Groves of St. Lucie County Community Development District is recently incorporated and has not previously awarded professional services contracts. Accordingly, no prior volume of work has been awarded to the Consultant by the District. However, the Consultant currently serves as Engineer of Record for two subdivisions and associated off-site utility and roadway improvements that are part of the master development served by the District.

ORGANIZATIONAL CHART

THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT

ALEXANDER M. DAUGHERTY, PE
Project Manager and CDD Engineer

KINAN F. HUSAINY, PE
Civil Engineer

BENJAMIN NUNEZ, EI
Engineering Analyst

MICHAEL PROCKO
Technical Support

JT LAPERNA
Administrative Support

LICENSES

State of Florida
Department of State

I certify from the records of this office that KIMLEY-HORN AND ASSOCIATES, INC. is a North Carolina corporation authorized to transact business in the State of Florida, qualified on April 24, 1968.

The document number of this corporation is 821359.

I further certify that said corporation has paid all fees due this office through December 31, 2026, that its most recent annual report/uniform business report was filed on January 10, 2026, and that its status is active.

I further certify that said corporation has not filed a Certificate of Withdrawal.

Given under my hand and the Great Seal of the State of Florida at Tallahassee, the Capital, this the Tenth day of February, 2026

Secretary of State

Tracking Number: 9013963510CU

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

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

Ron DeSantis, Governor

Melanie S. Griffin,Secretary

FBPE

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

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

DAUGHERTY, ALEXANDER MICHAEL

445 24TH STREET
SUITE 200
VERO BEACH FL 32960

LICENSE NUMBER: PE91957

EXPIRATION DATE: FEBRUARY 28, 2025

Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.

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

Ron DeSantis, Governor

Melanie S. Griffin,Secretary

FBPE

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

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

HUSAINY, KINAN FARRIS

545 32ND AVE SW
VERO BEACH FL 32968

LICENSE NUMBER: PE75481

EXPIRATION DATE: FEBRUARY 28, 2025

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.

Kimley»Horn

Expect More. Experience Better.

SECTION IX

STANDARD FORM 330

ARCHITECT – ENGINEER QUALIFICATIONS

PART I – CONTRACT SPECIFIC QUALIFICATIONS

A. CONTRACT INFORMATION

1. TITLE AND LOCATION *(City and State)*
The Groves of St. Lucie County Community Development District, St. Lucie County, FL

2. PUBLIC NOTICE DATE
February 10, 2026

3. SOLICITATION OR PROJECT NUMBER
N/A

B. ARCHITECT - ENGINEER POINT OF CONTACT

4. NAME AND TITLE
Alexander M. Daugherty, PE, Project Manager

5. NAME OF FIRM
Kimley-Horn and Associates, Inc.

6. TELEPHONE NUMBER
772.794.4067

7. FAX NUMBER
N/A

8. E-MAIL ADDRESS
alex.daugherty@kimley-horn.com

C. PROPOSED TEAM

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

	(Check) PRIME	J-V PARTNER	SUBCONTRACTOR	9. FIRM NAME	10. ADDRESS	11. ROLE IN THIS CONTRACT
a	X			Kimley-Horn and Associates, Inc. **[X]** CHECK IF BRANCH OFFICE	445 24th Street Vero Beach, FL 32960	Project management, Professional engineering services, Technical support, Administrative support
b	X			Kimley-Horn and Associates, Inc. **[X]** CHECK IF BRANCH OFFICE	7341 Office Park Place Melbourne, FL, 32940	Professional engineering services
c				**[]** CHECK IF BRANCH OFFICE		
d				**[]** CHECK IF BRANCH OFFICE		
e				**[]** CHECK IF BRANCH OFFICE		
f				**[]** CHECK IF BRANCH OFFICE		

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

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Alexander M. Daugherty, PE	**Project Manager; CDD Engineer**	**9**	**9**

15. FIRM NAME AND LOCATION *(City and State)*
Kimley-Horn and Associates, Inc.

16. EDUCATION *(DEGREE AND SPECIALIZATION)*	17. CURRENT PROFESSIONAL REGISTRATION *(STATE AND DISCIPLINE)*
Bachelor of Science / Civil Engineering / University of Florida	**FL / Professional Engineer / 91957**

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

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*
LTC Ranch CDD
Port St. Lucie, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(If Applicable)*
2019	Ongoing

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

[X] Check if project performed with current firm

CDD engineer and project engineer. Kimley-Horn is providing professional civil engineering services for the development of a 2,000-acre, 4,000-unit residential community. The LTC Ranch Community is located between Midway Road and Glades Cutoff Road, west of I-95 on 2,055 acres of land. Specific services provided by the Kimley-Horn team include due diligence, CDD engineering, traffic engineering, design, permitting, and construction phase services. Construction plans include a master drainage plan; master utility plan; paving, grading, and drainage plans; utility plan; and erosion control plan. This project has required approvals through the City of Port St Lucie, St Lucie County, Florida Water Management District (SFWMD), Florida Department of Environmental Protection, and Florida Department of Transportation (FDOT) District Four. Project Cost: $4.5M

b.

(1) TITLE AND LOCATION *(City and State)*
The Lakes at Waterway Village
Vero Beach, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(If Applicable)*
2016	Ongoing

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

[X] Check if project performed with current firm

Project engineer. Kimley-Horn is providing professional civil engineering services for the development of a 708-acre, 1,596-unit single-family, luxury community. The team's responsibilities include site plan; paving, grading, and drainage plans; water, sewer, and utility plans; dry utility coordination; and erosion control plans. Kimley-Horn is providing construction phase services for the remaining phases of the project. This project required approvals from Indian River County, Florida Department of Environmental Protection (FDEP), and the St. Johns River Water Management District (SJRWMD). Project Cost: $2M

c.

(1) TITLE AND LOCATION *(City and State)*
Del Webb at Tradition
Port St. Lucie, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(If Applicable)*
2016	Ongoing

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

[X] Check if project performed with current firm

Project engineer. Kimley-Horn is providing professional civil engineering services for the development of a 230-acre, four- phased, single-family residential community. Kimley-Horn's scope of services range from due diligence to construction phase services. Specific design plans include horizontal control; erosion sediment control; stormwater management; dewatering; paving, grading, and drainage; onsite water and sewer; as well as lift station pumping plans. The project required approvals from St. Lucie County, the South Florida Water Management District (SFWMD), and the Florida Department of Environmental Protection (FDEP). Project Cost: $650k

d.

(1) TITLE AND LOCATION *(City and State)*
Veranda Preserve
Port St. Lucie, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(If Applicable)*
2018	Ongoing

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

[X] Check if project performed with current firm

Project engineer. Kimley-Horn is providing professional civil engineering services for the development of a 165-acre, 786-unit single-family residential community. Kimley-Horn's scope of services included a site plan, paving and grading plan, water and sewer plan, lighting plan, as well as landscape and irrigation plans. Kimley-Horn also provided traffic engineering, construction documents, and permitting services. This project required approvals from St Lucie County, City of Port St. Lucie, and the South Florida Water Management District (SFWMD). Project Cost: $1.2M

e.

(1) TITLE AND LOCATION *(City and State)*
Veranda Estates
Port St. Lucie, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(If Applicable)*
2019	Ongoing

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

[X] Check if project performed with current firm

Project engineer. Kimley-Horn is providing professional civil engineering services for the development of a 200-acre, 138-unit residential, luxury community. The Veranda Estates Community is located on Becker Road and Gilson Road on 200-acres of land. Specific services provided by the Kimley-Horn team include due diligence, traffic engineering, design, permitting, and construction phase services. Construction plans include a master drainage plan; master utility plan; paving, grading, and drainage plans; utility plan; and erosion control plan. This project has required approvals through the City of Port St. Lucie, St. Lucie County, Florida Water Management District (SFWMD), and Florida Department of Transportation (FDOT) District Four. Project Cost: $450k

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
Kinan F. Husainy, PE	**Civil Engineer**	a. TOTAL **19**	b. WITH CURRENT FIRM **18**

15. FIRM NAME AND LOCATION *(City and State)*
Kimley-Horn and Associates, Inc.

16. EDUCATION *(DEGREE AND SPECIALIZATION)*	17. CURRENT PROFESSIONAL REGISTRATION *(STATE AND DISCIPLINE)*
Bachelor of Science / Civil Engineering / Florida State University	**FL / Professional Engineer / 75481**

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

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
Veranda Estates **Port St. Lucie, FL**	PROFESSIONAL SERVICES 2019	CONSTRUCTION *(If Applicable)* Ongoing
(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE	**[X]** Check if project performed with current firm	

Project manager. Kimley-Horn is providing professional civil engineering services for the development of a 200-acre, 138-unit residential, luxury community. The Veranda Estates Community is located on Becker Road and Gilson Road on 200-acres of land. Specific services provided by the Kimley-Horn team include due diligence, traffic engineering, design, permitting, and construction phase services. Construction plans include a master drainage plan; master utility plan; paving, grading, and drainage plans; utility plan; and erosion control plan. This project has required approvals through the City of Port St. Lucie, St. Lucie County, Florida Water Management District (SFWMD), and Florida Department of Transportation (FDOT) District Four. Project Cost: $450k

b.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
The Lakes at Waterway Village **Vero Beach, FL**	PROFESSIONAL SERVICES 2016	CONSTRUCTION *(If Applicable)* Ongoing
(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE	**[X]** Check if project performed with current firm	

Project manager. Kimley-Horn is providing professional civil engineering services for the development of a 708-acre, 1,596-unit single-family, luxury community. The team's responsibilities include site plan; paving, grading, and drainage plans; water, sewer, and utility plans; dry utility coordination; and erosion control plans. Kimley-Horn is providing construction phase services for the remaining phases of the project. This project required approvals from Indian River County, Florida Department of Environmental Protection (FDEP), and the St. Johns River Water Management District (SJRWMD). Project Cost: $2M

c.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
Del Webb at Tradition **Port St. Lucie, FL**	PROFESSIONAL SERVICES 2016	CONSTRUCTION *(If Applicable)* Ongoing
(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE	**[X]** Check if project performed with current firm	

Project manager. Kimley-Horn is providing professional civil engineering services for the development of a 230-acre, four- phased, single-family residential community. Kimley-Horn's scope of services range from due diligence to construction phase services. Specific design plans include horizontal control; erosion sediment control; stormwater management; dewatering; paving, grading, and drainage; onsite water and sewer; as well as lift station pumping plans. The project required approvals from St. Lucie County, the South Florida Water Management District (SFWMD), and the Florida Department of Environmental Protection (FDEP). Project Cost: $650k

d.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
Veranda Preserve **Port St. Lucie, FL**	PROFESSIONAL SERVICES 2018	CONSTRUCTION *(If Applicable)* Ongoing
(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE	**[X]** Check if project performed with current firm	

Project manager. Kimley-Horn is providing professional civil engineering services for the development of a 165-acre, 786-unit single-family residential community. Kimley-Horn's scope of services included a site plan, paving and grading plan, water and sewer plan, lighting plan, as well as landscape and irrigation plans. Kimley-Horn also provided traffic engineering, construction documents, and permitting services. This project required approvals from St Lucie County, City of Port St. Lucie, and the South Florida Water Management District (SFWMD). Project Cost: $1.2M

e.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
LTC Ranch CDD **Port St. Lucie, FL**	PROFESSIONAL SERVICES 2019	CONSTRUCTION *(If Applicable)* Ongoing
(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE	**[X]** Check if project performed with current firm	

Project engineer. Kimley-Horn is providing professional civil engineering services for the development of a 2,000-acre, 4,000-unit residential community. The LTC Ranch Community is located between Midway Road and Glades Cutoff Road, west of I-95 on 2,055 acres of land. Specific services provided by the Kimley-Horn team include due diligence, CDD engineering, traffic engineering, design, permitting, and construction phase services. Construction plans include a master drainage plan; master utility plan; paving, grading, and drainage plans; utility plan; and erosion control plan. This project has required approvals through the City of Port St Lucie, St Lucie County, Florida Water Management District (SFWMD), Florida Department of Environmental Protection, and Florida Department of Transportation (FDOT) District Four. Project Cost: $4.5M

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
Benjamin Nunez, EI	**Engineering Analyst**	a. TOTAL **3**	b. WITH CURRENT FIRM **1**

15. FIRM NAME AND LOCATION *(City and State)*
Kimley-Horn and Associates, Inc.

16. EDUCATION *(DEGREE AND SPECIALIZATION)*	17. CURRENT PROFESSIONAL REGISTRATION *(STATE AND DISCIPLINE)*
Bachelor of Science / Civil and Environmental Engineering / Virginia Polytechnic Institute & State University	**NC / Engineering Intern / A-31096**

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

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
LTC Ranch CDD **Port St. Lucie, FL**	PROFESSIONAL SERVICES 2019	CONSTRUCTION *(If Applicable)* Ongoing
(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE	**[X]** Check if project performed with current firm	

Project analyst. Kimley-Horn is providing professional civil engineering services for the development of a 2,000-acre, 4,000-unit residential community. The LTC Ranch Community is located between Midway Road and Glades Cutoff Road, west of I-95 on 2,055 acres of land. Specific services provided by the Kimley-Horn team include due diligence, CDD engineering, traffic engineering, design, permitting, and construction phase services. Construction plans include a master drainage plan; master utility plan; paving, grading, and drainage plans; utility plan; and erosion control plan. This project has required approvals through the City of Port St Lucie, St Lucie County, Florida Water Management District (SFWMD), Florida Department of Environmental Protection, and Florida Department of Transportation (FDOT) District Four. Project Cost: $4.5M

b.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
Creekside PUD **St. Lucie County**	PROFESSIONAL SERVICES 2022	CONSTRUCTION *(If Applicable)* Ongoing
(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE	**[X]** Check if project performed with current firm	

Project analyst. Kimley-Horn was selected to provide professional civil engineering services for the development of this single-family, luxury community. The team's responsibilities include site plan; paving, grading, and drainage plans; water, sewer, and utility plans; dry utility coordination; and erosion control plans. Kimley-Horn is providing construction phase services for the remaining phases of the project. This project required approvals from St. Lucie County, Florida Department of Environmental Protection (FDEP), North St. Lucie River Water Control District (NSLRWCD), United States Army Corps of Engineers (USACE), and South Florida Water Management District (SFWMD). Project Cost: $336.6k

c.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
Veranda Preserve **Port St. Lucie, FL**	PROFESSIONAL SERVICES 2018	CONSTRUCTION *(If Applicable)* Ongoing
(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE	**[X]** Check if project performed with current firm	

Project analyst. Kimley-Horn is providing professional civil engineering services for the development of a 165-acre, 786-unit single-family residential community. Kimley-Horn's scope of services included a site plan, paving and grading plan, water and sewer plan, lighting plan, as well as landscape and irrigation plans. Kimley-Horn also provided traffic engineering, construction documents, and permitting services. This project required approvals from St Lucie County, City of Port St. Lucie, and the South Florida Water Management District (SFWMD). Project Cost: $1.2M

d.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
Veranda Estates **Port St. Lucie, FL**	PROFESSIONAL SERVICES 2019	CONSTRUCTION *(If Applicable)* Ongoing
(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE	**[X]** Check if project performed with current firm	

Project analyst. Kimley-Horn is providing professional civil engineering services for the development of a 200-acre, 138-unit residential, luxury community. The Veranda Estates Community is located on Becker Road and Gilson Road on 200-acres of land. Specific services provided by the Kimley-Horn team include due diligence, traffic engineering, design, permitting, and construction phase services. Construction plans include a master drainage plan; master utility plan; paving, grading, and drainage plans; utility plan; and erosion control plan. This project has required approvals through the City of Port St. Lucie, St. Lucie County, Florida Water Management District (SFWMD), and Florida Department of Transportation (FDOT) District Four. Project Cost: $450k

e.

(1) TITLE AND LOCATION *(City and State)*	(2) YEAR COMPLETED	
The Lakes at Waterway Village **Vero Beach, FL**	PROFESSIONAL SERVICES 2016	CONSTRUCTION *(If Applicable)* Ongoing
(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE	**[X]** Check if project performed with current firm	

Project analyst. Kimley-Horn is providing professional civil engineering services for the development of a 708-acre, 1,596- unit single-family, luxury community. The team's responsibilities include site plan; paving, grading, and drainage plans; water, sewer, and utility plans; dry utility coordination; and erosion control plans. Kimley-Horn is providing construction phase services for the remaining phases of the project. This project required approvals from Indian River County, Florida Department of Environmental Protection (FDEP), and the St. Johns River Water Management District (SJRWMD). Project Cost: $2M

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

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

20. EXAMPLE PROJECT KEY NUMBER: **1**

21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (if Applicable)
LTC Ranch CDD **Port St. Lucie, FL**	**2019**	**Ongoing**

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Greenpointe Developers, LLC	**R. Austin Burr**	**904.910.7256**

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

Kimley-Horn is providing professional civil engineering services for the development of a large-scale residential community consisting of approximately 2,055 acres and 4,000 residential units. The LTC Ranch Community is located between Midway Road and Glades Cutoff Road, west of Interstate 95, encompassing approximately 2,055 acres of land.

Kimley-Horn's scope of services includes comprehensive support throughout the project lifecycle, beginning with due diligence efforts and extending through design, permitting, and construction phase services. The firm is also providing Community Development District (CDD) engineering and traffic engineering services to support the overall development framework. Construction plan preparation includes a master drainage plan and master utility plan, along with detailed paving, grading, and drainage plans. Additional design services include utility plans and erosion control plans prepared to meet applicable regulatory and site requirements.

The project has required coordination with and approvals from multiple regulatory agencies, including the City of Port St. Lucie, St. Lucie County, the South Florida Water Management District (SFWMD), the Florida Department of Environmental Protection (FDEP), and the Florida Department of Transportation (FDOT) District Four.

Project Cost: $4.5M

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	Kimley-Horn and Associates, Inc.	Vero Beach, FL	Prime
b.	Kimley-Horn and Associates, Inc.	Melbourne, FL	Prime

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

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

20. EXAMPLE PROJECT KEY NUMBER: **2**

21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (if Applicable)
The Lakes at Waterway Village **Vero Beach, FL**	**2016**	**Ongoing**

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Pulte Home Company	**Matt Nelson**	**561.602.3253**

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

Kimley-Horn is providing professional civil engineering services for the development of a 708-acre, 1,596-unit single-family luxury residential community. The project involves extensive planning and coordination efforts to support a large-scale, multi-phase development.

Kimley-Horn's responsibilities include the preparation of comprehensive site plans, along with detailed paving, grading, and drainage plans to support the proposed roadway and lot infrastructure. The scope also includes the design of water, sewer, and utility plans, as well as coordination with dry utility providers to ensure compatibility with the overall site layout and infrastructure systems. In addition, Kimley-Horn is responsible for the development of erosion control plans to address regulatory requirements and site conditions. The firm is providing construction phase services for the remaining phases of the project, supporting implementation of the approved design documents.

The project required coordination with and approval from multiple regulatory agencies, including Indian River County, the Florida Department of Environmental Protection (FDEP), and the St. Johns River Water Management District (SJRWMD), to ensure compliance with applicable local and state regulations.

Project Cost: $2M

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	Kimley-Horn and Associates, Inc.	Vero Beach, FL	Prime
b.	Kimley-Horn and Associates, Inc.	Melbourne, FL	Prime

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

21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (if Applicable)
Del Webb at Tradition **Port St. Lucie, FL**	**2016**	**Ongoing**

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Pulte Home Company	**Matt Nelson**	**561.602.3253**

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

Kimley-Horn is providing comprehensive professional civil engineering services in support of the development of a 230-acre, four-phased, single-family residential community. The firm's involvement spans the full lifecycle of the project, with services ranging from initial due diligence efforts through construction phase support.

Kimley-Horn's scope includes the preparation of detailed design and permitting documents for a wide variety of site and infrastructure elements, including horizontal control, erosion and sediment control, stormwater management systems, and dewatering plans. Additional design services encompass paving, grading, and drainage plans, as well as onsite water distribution and sanitary sewer systems. The scope also includes the development of lift station pumping plans necessary to support the proposed utility infrastructure.

The project required coordination with and approval from multiple regulatory agencies, including St. Lucie County, the South Florida Water Management District (SFWMD), and the Florida Department of Environmental Protection (FDEP), to ensure compliance with all applicable local, regional, and state requirements.

Project Cost: $650k

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	Kimley-Horn and Associates, Inc.	Vero Beach, FL	Prime
b.	Kimley-Horn and Associates, Inc.	Melbourne, FL	Prime

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

21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (if Applicable)
Veranda Preserve **Port St. Lucie, FL**	**2018**	**Ongoing**

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Greenpointe Developers, LLC	**R. Austin Burr**	**904.910.7256**

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

Kimley-Horn is providing professional civil engineering services for the development of a 165-acre, 786-unit single-family residential community.

Kimley-Horn's scope of services includes the preparation of a comprehensive site plan, along with paving and grading plans to support the proposed roadway and lot layout. The firm is also responsible for the design of water and sewer plans, as well as lighting plans and landscape and irrigation plans to support the overall site development. In addition to design services, Kimley-Horn provided traffic engineering services, construction documents, and permitting support to facilitate project approvals and implementation.

The project required coordination with and approvals from multiple regulatory agencies, including St. Lucie County, the City of Port St. Lucie, and the South Florida Water Management District (SFWMD), to ensure compliance with applicable local and regional requirements.

Project Cost: $1.2M

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	Kimley-Horn and Associates, Inc.	Vero Beach, FL	Prime
b.	Kimley-Horn and Associates, Inc.	Melbourne, FL	Prime

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

21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (if Applicable)
Veranda Estates **Port St. Lucie, FL**	**2019**	**Ongoing**

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Greenpointe Developers, LLC	**R. Austin Burr**	**904.910.7256**

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

Kimley-Horn is providing professional civil engineering services for the development of a 200-acre, 138-unit luxury residential community. The Veranda Estates Community is located at Becker Road and Gilson Road and encompasses approximately 200 acres of land.

Kimley-Horn's scope of services includes support throughout the project lifecycle, beginning with due diligence activities and extending through traffic engineering, design, permitting, and construction phase services. The team is responsible for preparing a comprehensive set of construction documents, including a master drainage plan and master utility plan, as well as detailed paving, grading, and drainage plans. Additional design elements include utility plans and erosion control plans developed to meet applicable regulatory requirements and site conditions.

The project has required coordination with and approvals from multiple agencies, including the City of Port St. Lucie, St. Lucie County, the South Florida Water Management District (SFWMD), and the Florida Department of Transportation (FDOT) District Four.

Project Cost: $450k

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	Kimley-Horn and Associates, Inc.	Vero Beach, FL	Prime
b.	Kimley-Horn and Associates, Inc.	Melbourne, FL	Prime

G. KEY PERSONNEL PARTICIPATION IN EXAMPLE PROJECTS

26. NAMES OF KEY PERSONNEL *(From Section E, Block 12)*	27. ROLE IN THIS CONTRACT *(From Section E, Block 13)*	28. EXAMPLE PROJECTS LISTED IN SECTION F *(Fill in "Example Projects Key" section below before completing table. Place "X" under project key number for participation in same or similar role.)*									
		1	2	3	4	5	6	7	8	9	10
Alexander M . Daugherty, PE	Project Manager; CDD Engineer	**X**	**X**	**X**	**X**	**X**					
Kinan F. Husainy, PE	Civil Engineer	**X**	**X**	**X**	**X**	**X**					
Benjamin Nunez, EI	Engineering Analyst	**X**	**X**		**X**	**X**					

29. EXAMPLE PROJECTS KEY

NO.	TITLE OF EXAMPLE PROJECT *(From Section F)*	NO.	TITLE OF EXAMPLE PROJECT *(From Section F)*
1	LTC Ranch CDD, Port St. Lucie, FL	6	
2	The Lakes at Waterway Village, Vero Beach, FL	7	
3	Del Webb at Tradition, Port St. Lucie, FL	8	
4	Veranda Preserve, Port St. Lucie, FL	9	
5	Veranda Estates, Port St. Lucie, FL	10	

H. ADDITIONAL INFORMATION

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

Founded in 1967, Kimley-Horn is a full-service, employee-owned, multidisciplinary consulting firm offering a broad range of engineering, planning, landscape architecture, and environmental services to clients in both the private and public sectors. Over the years, we have grown from a small group of engineers and planners to one of the most respected consulting engineering firms in the nation—and a recognized leader in land development. Today, Kimley-Horn has over 9,500 employees in more than 140 offices across the United States and in Puerto Rico, offering a full range of consulting services to local, regional, national, and international clients. Engineering News-Record (ENR) annually compiles and publishes the rankings of the 500 largest U.S. design firms (architectural and engineering firms), measured by gross revenues. Kimley-Horn's sound growth and stability is reflected in its steady rise on ENR's top 500 list. The firm first appeared on the list in 1981, when it ranked 421st. In 2021, Kimley-Horn ranked 10th overall and 6th among the top 100 "Pure Design Firms." This growth has been accompanied by a steadfast commitment to providing responsive client service and pursuing continuous quality improvement.

In addition, ENR named Kimley-Horn the 2015 Southeast Design Firm of the Year. The following awards provide even more insight into Kimley-Horn's culture:

- The firm has appeared on Fortune magazine's list of the 100 Best Companies To Work For 15 times: In 2025, we ranked 22nd.
- Ranked the #1 Civil Engineering Firm To Work For by CE News in 2004, 2006, and 2007. Kimley-Horn is the only firm to have been selected for this honor three times.
- Each year since 2008, Kimley-Horn has also been recognized by ENR as one of the nation's "Top Green Design Firms." More than 100 of our professionals across the firm have earned LEED accreditations.

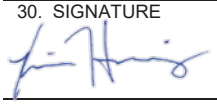
As consultants, we take pride in building real partnerships with clients. That means you get an expert Kimley-Horn team that delivers high-quality results on time and on budget, advocates for your best interests, and works closely with you and your entire development team throughout the site development process—from the earliest stages of due diligence and entitlements to construction bidding, inspection, and final punch lists. And, because Kimley-Horn makes deliberate business-planning decisions on hiring, growth, and client selection, we remain financially strong, independent, and stable.

Kimley-Horn offers a broad range of engineering, planning, landscape architectural, and environmental services including:

- Site civil engineering
    - Stormwater management
    - Water/wastewater treatment and collection systems
    - Paving and drainage
    - Utilities
- Land development services
- Landscape architecture
- Urban design and planning
- Predevelopment services
- Comprehensive planning
- Permitting and approvals
- Transportation planning/engineering and traffic operations
- Roadway and bridge design
- Advanced traffic management systems
- Areawide traffic signal systems
- Parking planning and design
- Public involvement programs
- Geographic Information Systems (GIS)
- Environmental permitting, assessment, and remediation
- Wetland delineation, assessment, and mitigation
- Construction administration/observation
- Building structures
- Surveying/platting
- Aviation planning and design

I. AUTHORIZED REPRESENTATIVE

The foregoing is a statement of facts.

30. SIGNATURE	31. DATE
	2/25/26

33. NAME AND TITLE

Kinan F. Husainy, PE, Vice President

ARCHITECT – ENGINEER QUALIFICATIONS

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

PART II – GENERAL QUALIFICATIONS

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

2a. FIRM (OR BRANCH OFFICE) NAME: **Kimley-Horn and Associates, Inc.**	3. YEAR ESTABLISHED: **2022**
	4. UNIQUE ENTITY IDENTIFIER: **V8PKGG6NLKV6**
2b. STREET: **7341 Office Park Place, Suite 102**	5. OWNERSHIP
	a. TYPE: **Corporation**
2c. CITY: **Melbourne** / 2d. STATE: **Florida** / 2e. ZIP CODE: **32940**	b. SMALL BUSINESS STATUS: **No**
6a. POINT OF CONTACT NAME AND TITLE: **Kinan F. Husainy, PE, Vice President**	7. NAME OF FIRM *(If block 2a is a branch office)*: **Kimley-Horn and Associates, Inc.**
6b. TELEPHONE NUMBER: **321-430-1138** / 6c. E-MAIL ADDRESS: **kinan.husainy@kimley-horn.com**	
8a. FORMER FIRM NAME(S) *(If any)*: **N/A**	8b. YR. ESTABLISHED: **N/A** / 8c. UNIQUE ENTITY IDENTIFIER: **N/A**

9. EMPLOYEES BY DISCIPLINE

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

a. Function Code	b. Discipline	c. No. of Employees (1) FIRM	c. No. of Employees (2) BRANCH	a. Profile Code	b. Experience	c. Revenue Index Number *(see below)*
02	Administrative	671	2	H11	Housing (Residential, Multifamily, Apartments, Con	5
08	CADD Technicians	353	1	C10	Commercial Building; (low rise); Shopping Centers	3
12	Civil Engineers	2221	4	S04	Sewage Collection, Treatment & Disposal	3
48	Project Managers	457	1	A06	Airports; Terminals; & Hangars; Freight Handling	2
57	Structural Engineers	220	1	R04	Recreational Facilities (Parks; Marinas; etc.)	2
58	Technician/Analysts	1756	10	W03	Water Supply; Treatment and Distribution	2
60	Transportation Engineers	886	1	S13	Stormwater Handling & Facilities	1
62	Water Resources Engineers	482	2	E02	Educational Facilities; Classrooms	1
64	Technical Writers	222	1	S07	Solid Wastes; Incineration; Landfill	1
65	Technical Support	1132	5	C11	Community Facilities	1
66	Graphic Designers	126	1	A05	Airports; Navaids; Airport Lighting; Aircraft Fuel	1
				C08	Codes; Standards; Ordinances	1
				H07	Highways; Streets; Airfield Paving; Parking Lots	1
				I01	Industrial Buildings; Manufacturing Plants	1
				P09	Product, Machine & Equipment Design	1
				U02	Urban Renewals; Community Development	1
				W02	Water Resources; Hydrology; Ground Water	1
	Other Employees	1420	0			
	Total	9946	28			

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

(Insert revenue index number shown at right)

a. Federal Work	1
b. Non-Federal Work	6
c. Total Work	6

PROFESSIONAL SERVICES REVENUE INDEX NUMBER

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

12. AUTHORIZED REPRESENTATIVE

The foregoing is a statement of facts.

a. SIGNATURE

b. DATE: 2/25/26

c. NAME AND TITLE: Kinan F. Husainy, PE, Vice President

ARCHITECT – ENGINEER QUALIFICATIONS

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

PART II – GENERAL QUALIFICATIONS

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

2a. FIRM (OR BRANCH OFFICE) NAME: **Kimley-Horn and Associates, Inc.**	3. YEAR ESTABLISHED: **1987**
	4. UNIQUE ENTITY IDENTIFIER: **V8PKGG6NLKV6**
2b. STREET: **445 24th Street, Suite 200**	5. OWNERSHIP
	a. TYPE: **Corporation**
2c. CITY: **Vero Beach** / 2d. STATE: **Florida** / 2e. ZIP CODE: **32960**	b. SMALL BUSINESS STATUS: **No**
6a. POINT OF CONTACT NAME AND TITLE: **Alexander M. Daugherty, PE, Project Manager**	7. NAME OF FIRM *(If block 2a is a branch office)*: **Kimley-Horn and Associates, Inc.**
6b. TELEPHONE NUMBER: **772-794-4100** / 6c. E-MAIL ADDRESS: **alex.daugherty@kimley-horn.com**	

8a. FORMER FIRM NAME(S) *(If any)*	8b. YR. ESTABLISHED	8c. UNIQUE ENTITY IDENTIFIER
N/A	**N/A**	**N/A**

9. EMPLOYEES BY DISCIPLINE / 10. PROFILE OF FIRM'S EXPERIENCE AND ANNUAL AVERAGE REVENUE FOR LAST 5 YEARS

a. Function Code	b. Discipline	c. No. of Employees (1) FIRM	c. No. of Employees (2) BRANCH	a. Profile Code	b. Experience	c. Revenue Index Number *(see below)*
02	Administrative	671	6	H07	Highways; Streets; Airfield Paving; Parking Lots	7
08	CADD Technicians	353	6	E07	Energy Conservation; New Energy Sources	6
12	Civil Engineers	2220	18	G01	Garages; Vehicle Maintenance Facilities; Parking D	6
13	Communications Engineers	25	1	H11	Housing (Residential, Multifamily, Apartments, Con	6
24	Environmental Scientists	120	2	I01	Industrial Buildings; Manufacturing Plants	6
38	Land Surveyors	59	1	O01	Office Building; Industrial Parks	6
39	Landscape Architects	225	2	R04	Recreational Facilities (Parks; Marinas; etc.)	6
48	Project Managers	457	4	T03	Traffic & Transportation Engineering	6
57	Structural Engineers	220	1	I04	Intelligent Transportation Systems	6
58	Technician/Analysts	1754	20	L03	Landscape Architecture	6
60	Transportation Engineers	886	4	C10	Commercial Building; (low rise); Shopping Centers	6
62	Water Resources Engineers	482	4	P05	Planning (Community; Regional; Areawide & State)	5
63	Design Technicians	168	1	S13	Stormwater Handling & Facilities	5
65	Technical Support	1134	11	U02	Urban Renewals; Community Development	5
				C12	Communications Systems; TV; Microwave	5
				R03	Railroad and Rapid Transit	4
				T01	Telephone Systems (Rural; Mobile; Intercom; etc.)	4
				W02	Water Resources; Hydrology; Ground Water	4
				B02	Bridge Design	4
				A06	Airports; Terminals; & Hangars; Freight Handling	4
	Other Employees	1172	0	E02	Educational Facilities; Classrooms	4
	Total	9946	80	R13	Roadway Design	3

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

(Insert revenue index number shown at right)

a. Federal Work	1
b. Non-Federal Work	9
c. Total Work	9

PROFESSIONAL SERVICES REVENUE INDEX NUMBER

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

12. AUTHORIZED REPRESENTATIVE

The foregoing is a statement of facts.

a. SIGNATURE

b. DATE: 2/25/26

c. NAME AND TITLE: Kinan Husainy, PE, Vice President

February 23, 2026

The Groves of St. Lucie County Community Development District
C/O Chris Conti
District Manager
Wrathell, Hunt & Associates, LLC
(561) 571-0010

Re: The Groves of St. Lucie County Community Development District
Professional Services Agreement

Dear Mr. Conti,

Kimley-Horn and Associates, Inc. ("Kimley-Horn" or "Consultant") is pleased to submit this letter agreement (the "Agreement") to The Groves of St. Lucie County Community Development District ("Client") for providing engineering consulting services for The Groves of St. Lucie County Community Development District as outlined below.

Scope of Services

Kimley-Horn will provide consulting services to The Groves of St. Lucie County Community Development District at our hourly rates. These services include but are not limited to the following:

- Preparation of the Engineering Report
- Attendance at Board Meetings
- Preparation of additional reports/Updating Reports
- Review of proposed changes to development

Kimley-Horn will attend meetings and prepare reports as required.

Additional Services

Any services not specifically provided for in the above scope will be billed as additional services and performed at our then current hourly rates.

Information Provided By Client

We shall be entitled to rely on the completeness and accuracy of all information provided by the Client or the Client's consultants or representatives. The Client shall provide all information requested by Kimley-Horn during the project, including but not limited to the following:

- A signed copy of this agreement
- A list of required meeting

Fee and Expenses

Kimley-Horn will perform the Services on a labor fee plus expense basis. Labor fee will be billed on an hourly basis according to our then-current rates.

Direct reimbursable expenses such as express delivery services, fees, air travel, and other direct expenses will be billed at 1.15 times cost. A percentage of labor fee will be added to each invoice to cover certain other expenses such as telecommunications, in-house reproduction, postage, supplies, project related computer time, and local mileage. Administrative time related to the project will be billed hourly. All permitting, application, and similar project fees will be paid directly by the Client.

Payment will be due within 25 days of your receipt of the invoice and should include the invoice number and Kimley-Horn project number.

Closure

In addition to the matters set forth herein, our Agreement shall include and be subject to, and only to, the attached Standard Provisions, which are incorporated by reference. As used in the Standard Provisions, "Consultant" shall refer to Kimley-Horn and Associates, Inc., and "Client" shall refer to The Groves of St Lucie County Community Development District.

Kimley-Horn, in an effort to expedite invoices and reduce paper waste, submits invoices via email in an Adobe PDF format. We can also provide a paper copy via regular mail if requested. include the invoice number and Kimley-Horn project number with all payments. Please provide the following information:

____ Please email all invoices to _____

____ Please copy _____

If you concur in all the foregoing and wish to direct us to proceed with the services, please have authorized persons execute both copies of this Agreement in the spaces provided below, retain one copy, and return the other to us. We will commence services only after we have received a fully-executed agreement.

To ensure proper set up of your projects so that we can get started, please complete and return with the signed copy of this Agreement the attached Request for Information. Failure to supply this information could result in delay in starting work on your project.

We appreciate the opportunity to provide these services to you. Please contact me if you have any questions.

Sincerely,

KIMLEY-HORN AND ASSOCIATES, INC.

By: Kinan Husainy, P.E.
Vice President

Alex Daugherty, P.E.
Project Manager

CLIENT:_____

BY: _____

ITS: _____

ATTEST:_____

(IF CORPORATION, AFFIX CORPORATE SEAL)

Client's Federal Tax ID: _____
Client's Business License No.: _____
Client's Street Address: _____
_____

Attachment – Request for Information
Attachment – Standard Provisions
Attachment – Certificate of Liability Insurance
Attachment – Current Hourly Rates
Attachment – Qualifications Statement for Engineering Services

Request for Information

Please return this information with your signed contract; failure to provide this information could result in delay in starting your project

Client Identification

Full, Legal Name of Client						
Mailing Address for Invoices						
Contact for Billing Inquiries						
Contact's Phone and e-mail						
Client is (check one)	Owner		Agent for Owner		Unrelated to Owner	

Property Identification

	Parcel 1	Parcel 2	Parcel 3	Parcel 4
Street Address				
County in which Property is Located				
Tax Assessor's Number(s)				

Property Owner Identification

	Owner 1	Owner 2	Owner 3	Owner 4
Owner(s) Name				
Owner(s) Mailing Address				
Owner's Phone No.				
Owner of Which Parcel #?				

Project Funding Identification – List Funding Sources for the Project

Attach additional sheets if there are more than 4 parcels or more than 4 owners

KIMLEY-HORN AND ASSOCIATES, INC.

STANDARD PROVISIONS

(1) **Kimley-Horn's Scope of Services and Additional Services.** Kimley-Horn will perform only the services specifically described in this Agreement. If requested by the Client and agreed to by Kimley-Horn, Kimley-Horn will perform Additional Services, which shall be governed by these provisions. Unless otherwise agreed to in writing, the Client shall pay Kimley-Horn for any Additional Services an amount based upon Kimley-Horn's then-current hourly rates plus an amount to cover certain direct expenses including telecommunications, in-house reproduction, postage, supplies, project related computer time, and local mileage. Other direct expenses will be billed at 1.15 times cost.

(2) **Client's Responsibilities.** In addition to other responsibilities herein or imposed by law, the Client shall:
a. Designate in writing a person to act as its representative, such person having complete authority to transmit instructions, receive information, and make or interpret the Client's decisions.
b. Provide all information and criteria as to the Client's requirements, objectives, and expectations for the project and all standards of development, design, or construction.
c. Provide Kimley-Horn all available studies, plans, or other documents pertaining to the project, such as surveys, engineering data, environmental information, etc., all of which Kimley-Horn may rely upon.
d. Arrange for access to the site and other property as required for Kimley-Horn to provide its services.
e. Review all documents or reports presented by Kimley-Horn and communicate decisions pertaining thereto within a reasonable time so as not to delay Kimley-Horn.
f. Furnish approvals and permits from governmental authorities having jurisdiction over the project and approvals and consents from other parties as may be necessary.
g. Obtain any independent accounting, legal, insurance, cost estimating, and feasibility services required by Client.
h. Give prompt written notice to Kimley-Horn whenever the Client becomes aware of any development that affects Kimley-Horn's services or any defect or noncompliance in any aspect of the project.

(3) **Period of Services.** Unless otherwise stated herein, Kimley-Horn will begin work after receipt of a properly executed copy of this Agreement. This Agreement assumes conditions permitting continuous and orderly progress through completion of the services. Times for performance shall be extended as necessary for delays or suspensions due to circumstances that Kimley-Horn does not control. If such delay or suspension extends for more than six months, Kimley-Horn's compensation shall be renegotiated

(4) **Method of Payment.** Client shall pay Kimley-Horn as follows:
a. Invoices will be submitted periodically for services performed and expenses incurred. Payment of each invoice will be due within 25 days of receipt. The Client shall also pay any applicable sales tax. All retainers will be held by Kimley-Horn and applied against the final invoice. Interest will be added to accounts not paid within 25 days at the maximum rate allowed by law. If the Client fails to make any payment due under this or any other agreement within 30 days after Kimley-Horn's transmittal of its invoice, Kimley-Horn may, after giving notice to the Client, suspend services and withhold deliverables until all amounts due are paid.
b. If the Client relies on payment or proceeds from a third party to pay Kimley-Horn and Client does not pay Kimley-Horn's invoice within 60 days of receipt, Kimley-Horn may communicate directly with such third party to secure payment.
c. If the Client objects to an invoice, it must advise Kimley-Horn in writing giving its reasons within 14 days of receipt of the invoice or the Client's objections will be waived, and the invoice shall conclusively be deemed due and owing. If the Client objects to only a portion of the invoice, payment for all other portions remains due.
d. If Kimley-Horn initiates legal proceedings to collect payment, it may recover, in addition to all amounts due, its reasonable attorneys' fees, reasonable experts' fees, and other expenses related to the proceedings. Such expenses shall include the cost, at Kimley-Horn's normal hourly billing rates, of the time devoted to such proceedings by its employees.
e. The Client agrees that the payment to Kimley-Horn is not subject to any contingency or condition. Kimley-Horn may negotiate payment of any check tendered by the Client, even if the words "in full satisfaction" or words intended to have similar effect appear on the check without such negotiation being an accord and satisfaction of any disputed debt and without prejudicing any right of Kimley-Horn to collect additional amounts from the Client.

(5) **Use of Documents.** All documents and data prepared by Kimley-Horn are related exclusively to the services described in this Agreement and may be used only if the Client has satisfied all of its obligations under this Agreement. They are not intended or represented to be suitable for use or reuse by the Client or others on extensions of this project or on any other project. Any modifications by the Client to any of Kimley-Horn's documents, or any reuse of the documents without written authorization by Kimley-Horn will be at the Client's sole risk and without liability to Kimley-Horn, and the Client shall indemnify, defend and hold Kimley-Horn harmless from all claims, damages, losses and expenses, including but not limited to attorneys' fees, resulting therefrom. Kimley-Horn's electronic files and source code remain the property of Kimley-Horn and shall be provided to the Client only if expressly provided for in this Agreement. Any electronic files not containing an electronic seal are provided only for the convenience of the Client

and use of them is at the Client's sole risk. In the case of any defects in the electronic files or any discrepancies between them and the hardcopy of the documents prepared by Kimley-Horn, the hardcopy shall govern.

(6) I**ntellectual Property.** Kimley-Horn may use or develop its proprietary software, patents, copyrights, trademarks, trade secrets, and other intellectual property owned by Kimley-Horn or its affiliates ("Intellectual Property") in the performance of this Agreement. Unless explicitly agreed to in writing by both parties to the contrary, Kimley-Horn maintains all interest in and ownership of its Intellectual Property and conveys no interest, ownership, license to use, or any other rights in the Intellectual Property to Client. Any enhancements of Intellectual Property made during the performance of this Agreement are solely owned by Kimley-Horn and its affiliates. If Kimley-Horn's services include providing Client with access to or a license for Kimley-Horn's (or its affiliates') proprietary software or technology, Client agrees to the terms of the Software License Agreement set forth at https://www.kimley-horn.com/khts-software-license-agreement ("the License Agreement") which terms are incorporated herein by reference.

(7) **Opinions of Cost.** Because Kimley-Horn does not control the cost of labor, materials, equipment or services furnished by others, methods of determining prices, or competitive bidding or market conditions, any opinions rendered as to costs, including but not limited to the costs of construction and materials, are made solely based on its judgment as a professional familiar with the industry. Kimley-Horn cannot and does not guarantee that proposals, bids or actual costs will not vary from its opinions of cost. If the Client wishes greater assurance as to the amount of any cost, it shall employ an independent cost estimator. Kimley-Horn's services required to bring costs within any limitation established by the Client will be paid for as Additional Services.

(8) **Termination.** The obligation to provide further services under this Agreement may be terminated by either party upon seven days' written notice in the event of substantial failure by the other party to perform in accordance with the terms hereof, or upon thirty days' written notice for the convenience of the terminating party. Kimley-Horn shall be paid for all services rendered and expenses incurred to the effective date of termination, and other reasonable expenses incurred by Kimley-Horn as a result of such termination.

(9) **Standard of Care.** The standard of care applicable to Kimley-Horn's services will be the degree of care and skill ordinarily exercised by consultants performing the same or similar services in the same locality at the time the services are provided. No warranty, express or implied, is made or intended by Kimley-Horn's performance of services, and it is agreed that Kimley-Horn is not a fiduciary with respect to the Client.

(10) **LIMITATION OF LIABILITY.** In recognition of the relative risks and benefits of the Project to the Client and Kimley-Horn, the risks are allocated such that, to the fullest extent allowed by law, and notwithstanding any other provisions of this Agreement or the existence of applicable insurance coverage, that the total liability, in the aggregate, of Kimley-Horn and Kimley-Horn's officers, directors, employees, agents, and subconsultants to the Client or to anyone claiming by, through or under the Client, for any and all claims, losses, costs or damages whatsoever arising out of or in any way related to the services under this Agreement from any causes, including but not limited to, the negligence, professional errors or omissions, strict liability or breach of contract or any warranty, express or implied, of Kimley-Horn or Kimley-Horn's officers, directors, employees, agents, and subconsultants, shall not exceed twice the total compensation received by Kimley-Horn under this Agreement or $50,000, whichever is greater. Higher limits of liability may be negotiated for additional fee. This Section is intended solely to limit the remedies available to the Client or those claiming by or through the Client, and nothing in this Section shall require the Client to indemnify Kimley-Horn.

(11) **Mutual Waiver of Consequential Damages.** In no event shall either party be liable to the other for any consequential, incidental, punitive, or indirect damages including but not limited to loss of income or loss of profits.

(12) **Construction Costs.** Under no circumstances shall Kimley-Horn be liable for extra costs or other consequences due to unknown conditions or related to the failure of contractors to perform work in accordance with the plans and specifications. Kimley-Horn shall have no liability whatsoever for any costs arising out of the Client's decision to obtain bids or proceed with construction before Kimley-Horn has issued final, fully approved plans and specifications. The Client acknowledges that all preliminary plans are subject to substantial revision until plans are fully approved and all permits obtained.

(13) **Certifications.** All requests for Kimley-Horn to execute certificates, lender consents, or other third-party reliance letters must be submitted to Kimley-Horn at least 14 days prior to the requested date of execution. Kimley-Horn shall not be required to execute certificates, consents, or third-party reliance letters that are inaccurate, that relate to facts of which Kimley-Horn does not have actual knowledge, or that would cause Kimley-Horn to violate applicable rules of professional responsibility.

(14) **Dispute Resolution.** All claims arising out of this Agreement or its breach shall be submitted first to mediation in accordance with the American Arbitration Association as a condition precedent to litigation.

(15) **Hazardous Substances and Conditions.** Kimley-Horn shall not be a custodian, transporter, handler, arranger,

contractor, or remediator with respect to hazardous substances and conditions. Kimley-Horn's services will be limited to analysis, recommendations, and reporting, including, when agreed to, plans and specifications for isolation, removal, or remediation. Kimley-Horn will notify the Client of unanticipated hazardous substances or conditions of which Kimley-Horn actually becomes aware. Kimley-Horn may stop affected portions of its services until the hazardous substance or condition is eliminated.

(16) **Construction Phase Services.**
a. If Kimley-Horn prepares construction documents and Kimley-Horn is not retained to make periodic site visits, the Client assumes all responsibility for interpretation of the documents and for construction observation, and the Client waives any claims against Kimley-Horn in any way connected thereto.
b. Kimley-Horn shall have no responsibility for any contractor's means, methods, techniques, equipment choice and usage, sequence, schedule, safety programs, or safety practices, nor shall Kimley-Horn have any authority or responsibility to stop or direct the work of any contractor. Kimley-Horn's visits will be for the purpose of endeavoring to provide the Client a greater degree of confidence that the completed work of its contractors will generally conform to the construction documents prepared by Kimley-Horn. Kimley-Horn neither guarantees the performance of contractors, nor assumes responsibility for any contractor's failure to perform its work in accordance with the contract documents.
c. Kimley-Horn is not responsible for any duties assigned to it in the construction contract that are not expressly provided for in this Agreement. The Client agrees that each contract with any contractor shall state that the contractor shall be solely responsible for job site safety and its means and methods; that the contractor shall indemnify the Client and Kimley-Horn for all claims and liability arising out of job site accidents; and that the Client and Kimley-Horn shall be made additional insureds under the contractor's general liability insurance policy.

(17) **No Third-Party Beneficiaries; Assignment and Subcontracting.** This Agreement gives no rights or benefits to anyone other than the Client and Kimley-Horn, and all duties and responsibilities undertaken pursuant to this Agreement will be for the sole benefit of the Client and Kimley-Horn. The Client shall not assign or transfer any rights under or interest in this Agreement, or any claim arising out of the performance of services by Kimley-Horn, without the written consent of Kimley-Horn. Kimley-Horn reserves the right to augment its staff with subconsultants as it deems appropriate due to project logistics, schedules, or market conditions. If Kimley-Horn exercises this right, Kimley-Horn will maintain the agreed-upon billing rates for services identified in the contract, regardless of whether the services are provided by in-house employees, contract employees, or independent subconsultants.

(18) **Confidentiality.** The Client consents to the use and dissemination by Kimley-Horn of photographs of the project and to the use by Kimley-Horn of facts, data and information obtained by Kimley-Horn in the performance of its services. If, however, any facts, data or information are specifically identified in writing by the Client as confidential, Kimley-Horn shall use reasonable care to maintain the confidentiality of that material.

(19) **Miscellaneous Provisions.** This Agreement is to be governed by the law of the State of Florida. This Agreement contains the entire and fully integrated agreement between the parties and supersedes all prior and contemporaneous negotiations, representations, agreements, or understandings, whether written or oral. Except as provided in Section 1, this Agreement can be supplemented or amended only by a written document executed by both parties. Any conflicting or additional terms on any purchase order issued by the Client shall be void and are hereby expressly rejected by Kimley-Horn. If Client requires Kimley-Horn to register with or use an online vendor portal for payment or any other purpose, any terms included in the registration or use of the online vendor portal that are inconsistent or in addition to these terms shall be void and shall have no effect on Kimley-Horn or this Agreement. Any provision in this Agreement that is unenforceable shall be ineffective to the extent of such unenforceability without invalidating the remaining provisions. The non-enforcement of any provision by either party shall not constitute a waiver of that provision nor shall it affect the enforceability of that provision or of the remainder of this Agreement.

(20) PURSUANT TO FS 558.0035, EMPLOYEES OF KIMLEY-HORN MAY NOT BE HELD INDIVIDUALLY LIABLE FOR DAMAGES RESULTING FROM NEGLIGENCE UNDER THIS AGREEMENT.

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY): 2/20/2026

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 Edgewood Partners Ins Center 3780 Mansell Rd. Suite 370 Alpharetta GA 30022	**CONTACT NAME:** Jerry Noyola **PHONE (A/C, No, Ext):** 770.552.4225 **FAX (A/C, No):** **E-MAIL ADDRESS:** greylingcerts@greyling.com
INSURED KIMLASS Kimley-Horn and Associates, Inc. 421 Fayetteville Street, Suite 600 Raleigh, NC 27601	**INSURER(S) AFFORDING COVERAGE** / **NAIC #** **INSURER A :** National Union Fire Ins Co of Pittsburg — 19445 **INSURER B :** Allied World Assurance Co (U.S.) Inc. — 19489 **INSURER C :** New Hampshire Insurance Company — 23841 **INSURER D :** Lloyd's of London — 85202 **INSURER E :** **INSURER F :**

COVERAGES **CERTIFICATE NUMBER:** 528384978 **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	X **COMMERCIAL GENERAL LIABILITY** [ ] CLAIMS-MADE [X] OCCUR X Contractual Liab GEN'L AGGREGATE LIMIT APPLIES PER: [ ] POLICY [X] PRO-JECT [X] LOC [ ] OTHER:			GL5268169	4/1/2025	4/1/2026	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG	$ 2,000,000 $ 1,000,000 $ 25,000 $ 2,000,000 $ 4,000,000 $ 4,000,000
A A	**AUTOMOBILE LIABILITY** X ANY AUTO [ ] OWNED AUTOS ONLY [ ] SCHEDULED AUTOS X HIRED AUTOS ONLY [X] NON-OWNED AUTOS ONLY			CA4489663 (AOS) CA2970071 (MA)	4/1/2025 4/1/2025	4/1/2026 4/1/2026	COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)	$ 2,000,000 $ $ $
B	X **UMBRELLA LIAB** [X] OCCUR X **EXCESS LIAB** [ ] CLAIMS-MADE [ ] DED [X] RETENTION $ 10,000			03127930	4/1/2025	4/1/2026	EACH OCCURRENCE AGGREGATE	$ 5,000,000 $ 5,000,000
C C	**WORKERS COMPENSATION AND EMPLOYERS' LIABILITY** ANYPROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? Y / N: N **(Mandatory in NH)** If yes, describe under DESCRIPTION OF OPERATIONS below	N / A		WC067961230 (AOS) WC013711885 (CA)	4/1/2025 4/1/2025	4/1/2026 4/1/2026	X PER STATUTE [ ] OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	 $ 2,000,000 $ 2,000,000 $ 2,000,000
D	Professional Liability			B0146LDUSA2504949	4/1/2025	4/1/2026	Per Claim Aggregate	$2,000,000 $2,000,000

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

Re: The Groves of St. Lucie County Community Development District. Wrathell, Hunt and Associates, LLC is named as an Additional Insured with respects to General Liability where required by written contract.

CERTIFICATE HOLDER

Wrathell, Hunt and Associates, LLC
2300 Glades Road, Suite 410W
Boca Raton FL 33431

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

Gregg Buchholz

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Kimley»Horn

Kimley-Horn and Associates, Inc.

Hourly Labor Rate Schedule

Classification	*Rate*
Analyst	$180 - $270
Professional	$260 - $335
Senior Professional I	$310 - $425
Senior Professional II	$430 - $450
Senior Technical Support	$195 - $310
Support Staff	$145 - $175
Technical Support	$150 - $215

Effective through June 30, 2026

Subject to adjustment thereafter

Internal Reimbursable Expenses will be charged at 5% of Labor Billings

External Reimbursable Expenses will be charged at 15% mark-up, or per the Contract

Sub-Consultants will be billed per the Contract

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

14CII

South Florida Engineering and Consulting LLC

February 25, 2026

The Groves of St. Lucie County Community Development District
District Manager's Office
Wrathell, Hunt and Associates, LLC
2300 Glades Road, Suite 410W
Boca Raton, FL 33431

RE: Proposal Responding to RFQ for Engineering Services (Continuing Basis) for The Groves Community Development District of St. Lucie County

Dear District Manager and Selection Committee,

South Florida Engineering and Consulting LLC (SFEC) is pleased to submit this Qualification Statement and Standard Form (SF) 330 in response to the *Request for Qualifications for Engineering Services for The Groves of St. Lucie County Community Development District*. As a local, Florida-based firm specializing in environmental engineering and stormwater management, we are uniquely positioned to serve The Groves' needs on a continuing basis.

Professional Personnel and Project Lead

SFEC has assembled a highly qualified team specifically for The Groves. Per the RFQ requirements, Thomas V. Conboy, P.E., will serve as the primary District Engineer. Mr. Conboy is authorized to make representations for the firm and will be responsible for managing the team, handling meetings, construction services, and specialized engineering tasks related to Chapter 190, Florida Statutes. He is supported by a robust team of scientists and engineers, including Dr. Andrew Gottlieb.

St. Lucie County and CDD Experience

SFEC possesses a proven track record within St. Lucie County and deep expertise in environmental engineering. Our relevant local experience includes:

- *Ancient Oaks Stormwater Treatment Area (St. Lucie County)*: Design and permitting for a water quality treatment and stormwater pond project.
- *Indrio Savannahs Wet Pond (St. Lucie County)*: Hydrologic restoration and stormwater detention project.
- *River Park Baffle Boxes (St. Lucie County)*: Construction Engineering Inspection (CEI) for neighborhood stormwater system retrofitting.

Capacity and Geographic Location

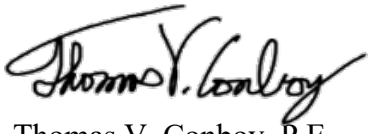
Headquartered in Lake Worth Beach, SFEC is located in close proximity to The Groves, ensuring rapid response times and thorough local knowledge. Our current and projected workloads for FY2026-2028 confirm that we have the immediate staff availability to prioritize The Groves' needs without resource conflict.

Regulatory Compliance

SFEC holds all applicable federal, state, and local licenses and is fully authorized to do business in Florida. Furthermore, SFEC is a certified Small Business with South Florida Water Management District (SFWMD) and Florida Department of Transportation (FDOT), and is a federally certified HUBZone enterprise.

We are committed to meeting The Groves' time and budget requirements with consistently dependable results that we are known for.

Sincerely,



Thomas V. Conboy, P.E.
SFEC President/Principal Engineer
tconboy@sfec.us

QUALIFICATION STATEMENT: DISTRICT ENGINEER SERVICES FOR THE GROVES COMMUNITY DEVELOPMENT DISTRICT OF ST. LUCIE COUNTY

TO: Board of Supervisors, The Groves of St. Lucie County Community Development District
FROM: South Florida Engineering and Consulting LLC (SFEC)
DATE: February 25, 2026
RE: RFQ for Engineering Services (Continuing Basis) for The Groves of St. Lucie County Community Development District

1. Professional Personnel & Project Lead

South Florida Engineering and Consulting LLC (SFEC) is a multidisciplinary firm specializing in water resources, stormwater management, and construction engineering inspection (CEI).

- **Designated District Engineer: Thomas V. Conboy, P.E.**, President and Principal Engineer of SFEC, will lead this contract. With over 30 years of experience, Mr. Conboy is an expert in hydrologic modeling and optimizing regional water systems. He will be personally responsible for attending District meetings, providing general consultation, and overseeing all engineering tasks.
- **Team Adequacy:** Our team is composed of seasoned professionals with specialized expertise in Florida's unique hydrologic and regulatory landscape. Each key member brings a history of successful collaboration with water management districts and local municipalities:
    - **Thomas V. Conboy, P.E. (Program Manager)**: Mr. Conboy has directed complex National Environmental Policy Act (NEPA) processes and large-scale Flood Protection Level of Service (FPLOS) assessments involving multi-watershed modeling as well as lead many environmental engineering projects of all sizes.
    - **M. Zaki Moustafa, Ph.D. (Principal Modeler / QA/QC)**: An expert with 37 years of experience in hydrodynamic and water quality modeling. Dr. Moustafa specializes in optimizing phosphorus retention in Stormwater Treatment Areas (STAs) and conducting system-wide infrastructure reviews.
    - **Georgio Tachiev, Ph.D., P.E. (Senior Hydrodynamic Modeler)**: Bringing 30 years of experience, Dr. Tachiev is an expert in 2D and 3D numerical software (MIKE SHE, CFD, HEC-RAS) used for scour depth analysis, spillway design, and stormwater master planning.
    - **Mahmoud Madkour, Ph.D., P.E. (Lead Structural Engineer)**: With 30 years of experience, Dr. Madkour has a proven track record as an Engineer of Record for large-scale habitat restoration, dewatering projects, and the design of complex water control structures such as weirs and concrete spillways.
    - **Andrew Gottlieb, Ph.D., PWS (Principal Scientist)**: With 26 years of experience, Dr. Gottlieb leads ecological assessments, wetland permitting, and the development of performance metrics for hydrologic restoration projects across Florida.
    - **Christopher W. McVoy, Ph.D. (Lead Soil Scientist)**: A noted eco-hydrologist with 32 years of experience, Dr. McVoy provides specialized expertise in pre-drainage hydrology, soil physics, and the development of restoration strategies for large-scale wildlife management areas.
    - **Tanzina Afrin, M.S. (Hydrologic Modeler)**: With 20 years of experience, Ms. Afrin specializes in fluvial morphodynamics and integrated surface-groundwater

modeling. She has extensive experience designing box culverts and pump stations to optimize stormwater management.
    - **Michael Adler, M.S. (Senior Environmental Scientist / GIS)**: With 20 years of experience, Mr. Adler provides critical geo-spatial analysis, Threatened and Endangered (T&E) species surveying, and GIS-based habitat restoration planning.

2. Experience as District Engineer & St. Lucie County Expertise

SFEC has a deep history of providing engineering and scientific support to public agencies under the Consultants' Competitive Negotiation Act (CCNA).

- **Specific St. Lucie County Experience:** The SFEC team has considerable experience throughout Florida, with quite a lot of emphasis in the St. Lucie County area. We have recently completed critical stormwater and water quality projects for St. Lucie County, including:
    - **Ancient Oaks Stormwater Treatment Area:** Design, modeling, and permitting for a stormwater retrofit and water quality improvement site.
    - **Indrio Savannahs Wet Pond:** Restoration and detention project involving hybrid hydrologic reconnection and nutrient absorption.
    - **River Park Baffle Boxes:** CEI services for the installation of baffle boxes to retrofit the neighborhood stormwater system.
- **CDD/Chapter 190 Familiarity:** SFEC is deeply knowledgeable about current agency rules and regulations. Our team is experienced in managing stormwater systems and public improvements consistent with the requirements of community development districts.

3. Operational Logistics & Capacity

- **Geographic Location:** SFEC is headquartered in **Lake Worth Beach, Florida**. Our proximity allows for rapid, next-day response times for field visits and coordination with The Groves' stakeholders.
- **Current & Projected Workload:** Based on our FY2026-FY2028 analysis, SFEC has immediate capacity and availability to transition unallocated staff hours to support The Groves' needs without resource conflict.
- **Time & Budget Commitment:** We have a proven track record of meeting strict timelines and budgets while exceeding client expectations and budget expectations. For example, our Ancient Oaks project was delivered 5% below the estimated construction cost.

4. Regulatory Compliance & MBE Status

- **Licensing:** SFEC and all assigned professionals hold valid federal, state, and local licenses required to perform the work.
- **Corporate Status:** SFEC is a Florida LLC authorized to do business in the state.
- **MBE Status:** Although not an MBE, SFEC is a **Certified Small Business** for South Florida Water Management District (SFWMD) and Florida Department of Transportation (FDOT) and federally certified **HUBZone** business.

ARCHITECT – ENGINEER QUALIFICATIONS

PART I – CONTRACT-SPECIFIC QUALIFICATIONS

A. CONTRACT INFORMATION

1. TITLE AND LOCATION (City and State)
Engineering Services for The Groves of St. Lucie County Community Development District

2. PUBLIC NOTICE DATE	3. SOLICITATION OR PROJECT NUMBER
February 10, 2026	

B. ARCHITECT-ENGINEER POINT OF CONTACT

4. NAME AND TITLE
Thomas V. Conboy, P.E.

5. NAME OF FIRM
South Florida Engineering and Consulting LLC

6. TELEPHONE NUMBER	7. FAX NUMBER	8. E-MAIL ADDRESS
(561) 412-6997	N/A	tconboy@sfec.us

C. PROPOSED TEAM

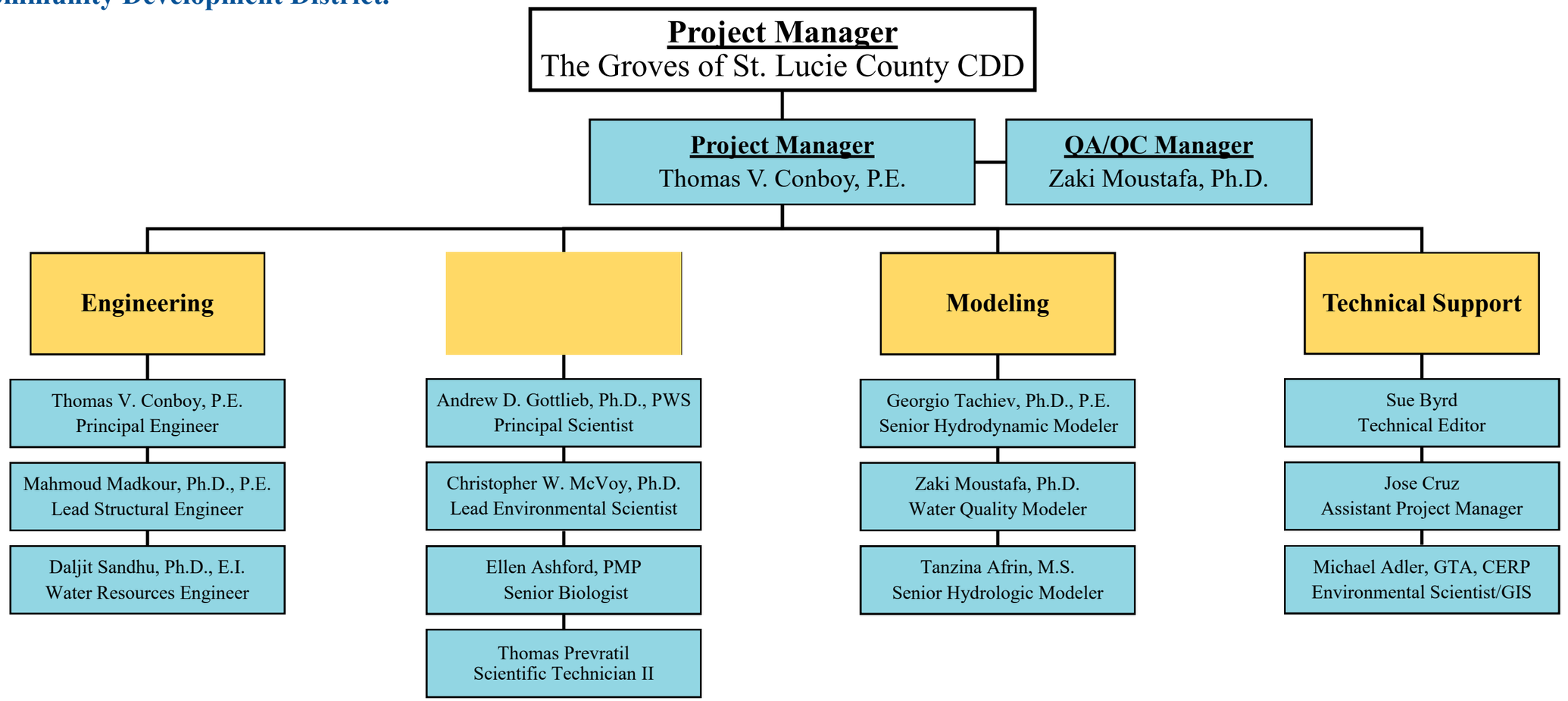
(Complete this section for the prime contractor and all key subcontractors)

	PRIME	J-V PARTNER	SUBCON-TRACTOR	9. FIRM NAME	10. ADDRESS	11. ROLE IN THIS CONTRACT
a.	☒	☐	☐	South Florida Engineering and Consulting LLC ☐ CHECK IF BRANCH OFFICE	30 South M Street Lake Worth Beach, FL, 33460	Prime Consultant

D. ORGANIZATIONAL CHART OF PROPOSED TEAM ☒ (Attached)

Team Organization Chart

Engineering Services for
The Groves of St. Lucie County
Community Development District.



South Florida
Engineering & Consulting

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Thomas V. Conboy, P.E.	**Program Manager**	31	14

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

South Florida Engineering and Consulting LLC, Lake Worth Beach, FL

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*
B.S., Environmental Engineering	Professional Engineer, FL, #59289

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

Florida Engineering Leadership Institute, Florida Engineering Society, American Society of Civil Engineers
University of Florida – Executive Education – Strategic Project Management & Project Risk Management

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*
East Lake Tohopekaliga Drawdown Environmental Impact Statement (EIS), Osceola County, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2019	2020

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

Project Management and Principal Engineer. Directed the NEPA process and development of the EIS. Provided project management and engineering support.

b.

(1) TITLE AND LOCATION *(City and State)*
Western Everglades Restoration Project (WERP) Crossings, Collier, Monroe, and Miami-Dade Counties, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2024	N/A

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

Program Manager. A work order-based contract with SFWMD not to exceed $15,500,000. This was a 5-year professional services contract in which SFEC has been reselected for up to 5 more years. SFEC has received 13 work orders and provided Ecological and Scientific Professional Service to SFWMD.

c.

(1) TITLE AND LOCATION *(City and State)*
FPLOS (Flood Protection Level of Service) Assessment for Current and Future Conditions in C-111 Coastal, C-111 South, C-111 AG, Model Land, and L-31NS Watersheds, Miami-Dade County, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2024	N/A

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

Project Manager. Developed a hydrological and hydraulic model for the project area. The primary objectives were to develop and calibrate hydrologic and hydraulic models for the watersheds C111 South, C-111 Coastal, C-111 AG, Model-Land, and L-31NS, and to use those models in the evaluation of the Floodplain Level of Service (FPLOS) for existing and future conditions. Evaluations were assessed using six (6) performance metrics defined by the District. Construction: $596,270.91

d.

(1) TITLE AND LOCATION *(City and State)*
SFWMD, WO9 – Sustainable Landscape & Treatment in a Stormwater Treatment Area, Palm Beach County, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2023	2024

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

Project Manager. The objective of this study was to provide guidance on hydraulic regimes that are consistent with in-situ landscape vegetation, to provide optimal Phosphorous treatment and reduce vegetation loss. SFEC coordinated the design and installation of the project flume as well as submitted a completed work plan. The goal of this study is to achieve sustainability while maintaining controllability in treatment wetlands through flow discharges, water depth, water slope, and vegetation resistance. Construction: $658,633.42

e.

(1) TITLE AND LOCATION *(City and State)*
Loxahatchee River Watershed Restoration Project (LRWRP) – Flowway 3, Martin and Palm Beach Counties, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
Ongoing	N/A

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

Project Manager. The hydraulic modeling tasks include the development of seven different hydraulic models and analysis of the existing and proposed hydraulic structures to determine the channel hydraulics, flooding, and backwater effects in support of structure design. As a sub-consultant to WSP, SFEC is responsible for the development and analysis of seven detailed H&H models for the project areas included within Flow Way 3 and used these models to evaluate extension and proposed conditions. The detailed hydraulic modeling effort focused on channel hydraulics, backwater effects and structure design. Construction: $721,158.00

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Andrew Gottlieb, Ph.D.	**Principal Scientist, Director of Ecological and Environmental Services**	26	12

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

South Florida Engineering and Consulting LLC, Lake Worth Beach, FL

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*
Ph.D. Biology and Aquatic Ecology M.S. Agricultural Ecology	Professional Wetland Scientist, FL, #3354

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

Primary author and Co-author/editor: Microbiology of the Everglades Ecosystem, J.A. Entry, A.D. Gottlieb, K. Jayachandrahan, & A.V. Ogram (Eds.). CRC Press, Boca Raton, FL (2015).
Primary and Co-author: Peer reviewed articles on 1) effects of hydroperiod and nutrients on the periphyton and plant communities, 2) functionality of stormwater treatment areas, and 3) wood stork foraging habitat (Southeastern Naturalist, Aquatic Botany, Hydrobiologia, Ecological Indicators, Environmental Monitoring & Assessment, and Critical Reviews in Environmental Science & Technology).

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*
Loxahatchee River Watershed Restoration Project, Flowway 3, Martin County, FL

(2) YEAR COMPLETED	
PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
Ongoing	N/A

(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE ☒ Check if project performed with current firm
Principal Scientist. Conducted field surveys and habitat assessment in support of project design, permitting and operations. Develop performance metrics to evaluate hydrologic model results. Support Biological Assessment.

b.

(1) TITLE AND LOCATION *(City and State)*
Water Quality Monitoring and Reporting Services, Various Counties, FL

(2) YEAR COMPLETED	
PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2025	N/A

(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE ☒ Check if project performed with current firm
Lead Environmental Scientist/Analyst. Water Quality Bureau Support for FY2024 Restoration Projects Florida Department of Environmental Protection Permit Reporting (C-111 SC, Lakeside Ranch & C-44 STA).

c.

(1) TITLE AND LOCATION *(City and State)*
Ecology and Environmental Scientific and Technology Support Services, 16 Counties, FL

(2) YEAR COMPLETED	
PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2024	N/A

(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE ☒ Check if project performed with current firm
Principal Scientist and Project Manager for various work orders. C-51 Canal Sediment Trap and Structure Flow Assessment. Biological/Ecological Evaluations of the Lake Okeechobee Watershed Restoration Project C-38 ASR Clusters. In-Depth Data Analysis and Integration of C-43 Water Quality Treatment and Testing Project – Phase I Bioassays/ Mesocosms. Spatial Soil Sampling in the C-44 and Lakeside Ranch Phase II Stormwater Treatment Areas and the Ten Mile Creek Water Preserve Area (plant taxonomy, soil sampling, and lab analysis). Water Quality Bureau Support for FY2022 New Works /Restoration Projects (C-111 SC, Picayune Strand Rest. Project).

d.

(1) TITLE AND LOCATION *(City and State)*
Indrio Savannahs Wet Pond Restoration, St. Lucie County, FL

(2) YEAR COMPLETED	
PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
Ongoing	N/A

(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE ☒ Check if project performed with current firm
Project Manager/Lead Environmental Scientist. Conducted ecological assessments including vegetation, habitat, and topographic mapping. Supported design of wetland sheet flow restoration project elements. H&H model evaluation, environmental permitting and public meeting support.

e.

(1) TITLE AND LOCATION *(City and State)*
Ancient Oaks Stormwater Treatment Area, St. Lucie County, FL

(2) YEAR COMPLETED	
PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
Ongoing	N/A

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

Project Manager/Lead Environmental Scientist. Evaluation and design of a stormwater treatment area for Ancient Oaks Preserve in support of the State of Florida water quality goals outlined in the St. Lucie River and Estuary BMAP. Project included site assessment, public meetings, alternative evaluation, feature design, water quality and H&H modeling, and Environmental Resource Permitting.

f.

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

Ecology and Environmental Scientific and Technology Support Services, 16 Counties, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
Ongoing	N/A

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

Principal Scientist and Project Manager for various work orders. WO 02 - Dispersed Water Management Program Monitoring Services for Northern Everglades Public Private Partnership Projects. WO 03 - Technical Support for Monitoring Biological and Hydrologic Responses in the Central Everglades Planning Project - South (CEPP-S) and Active Marsh Improvement (AMI) Projects – pending. WO 04 - Technical Support for Monitoring Biological and Hydrologic Responses in the Central Everglades Planning Project South and Active Marsh Improvement Regions – pending.

g.

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

East Lake Tohopekaliga Drawdown and Habitat Enhancement Environmental Impact Statement, Osceola County, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2019	N/A

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

Lead Environmental Scientist/Biologist. Developed the Listed Species Biological Assessment for submission to USFWS. Provided expertise in water quality and ecology to refine project alternatives. Conducted project alternative affects analysis for water quality, wetlands, fish and wildlife. Evaluated spoil island location and features to improve stability, habitat & aesthetics.

h.

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

Dinner Island Ranch WMA Hydrologic Assessment, Hendry County, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2019	N/A

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

Project Manager/Lead Environmental Scientist. Analyzed the development of restoration strategies and management activities to reestablish sheet flow and rainfall driven hydroperiods to improve the function of terrestrial and aquatic habitats within the 34 square mile WMA. Developed performance measures for hammock and depressional wetland communities. Conducted field assessments including vegetation surveys. Conducted research - aimed at restoration of pasture to wet prairie habitat - comparing the effects of inundation duration on native and exotic seed germination rates.

i.

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

J.W. Corbett Wildlife Management Area Hydrologic Assessment, Palm Beach County, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2016	N/A

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

Senior Environmental Scientist/Biologist. Conducted the ecological assessment of flatwood, marsh, prairie and cypress mosaic for the J.W. Corbett Wildlife Management Area (WMA) Hydrologic Assessment. Evaluated hydrologic optima and develop recommended hydroperiod targets for the WMA habitats. Base targets on field assessment of habitat and plant/hydroperiod indicator elevations as well as soil profiles (peat depths and elevation). Developed performance measures to evaluate potential of management measures to improve ecological health of upland and wetland habitats in the WMA. Provided scientific support for interagency coordination meetings.

j.

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

Woodchip Bio-Retention of Total Nitrogen Pilot Project, City of Bonita Springs, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2015	N/A

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

Senior Environmental Scientist. Evaluate the potential for the use of woodchip denitrifying bio-reactors to reduce nitrate concentrations within the Imperial River Watershed for the City of Bonita Springs. Perform environmental analyses of water quality, environmental design and engineering services. Conduct literature review and site surveys. Characterize the potential for implementation in three variable site conditions. Recommend related water budgets and nitrate treatment estimates.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Christopher W. McVoy, Ph.D.	**Lead Soil Scientist**	32	12

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

South Florida Engineering and Consulting LLC, Lake Worth Beach, FL

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*
Post-doc., Systems Ecology Ph.D., Soil Physics M.S., Soil Physics A.B., Biology/Systems Ecology	

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

Over 20 years of field, remote sensing, historical and modeling research experience specific to the ecosystems and hydrology of South Florida. Author of Landscapes and Hydrology of the Pre-drainage Everglades, the definitive characterization of the pre-drainage hydrology and ecology of the Everglades. Maintains an active geomorphology research program in the Everglades (WCA 3A).

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*
East Lake Tohopekaliga Drawdown and Habitat Enhancement Environmental Impact Statement, Osceola County, FL

(2) YEAR COMPLETED: PROFESSIONAL SERVICES 2019 | CONSTRUCTION *(IF APPLICABLE)* N/A

(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE ☒ Check if project performed with current firm
Lead Environmental/Soil Scientist. Developed the Biological Assessment for UFWS and provided environmental expertise in soils and ecology for the NEPA process and development of the EIS. Characterized study of littoral zone soils.

b.

(1) TITLE AND LOCATION *(City and State)*
Dinner Island Ranch WMA Hydrologic Assessment, Hendry County, FL

(2) YEAR COMPLETED: PROFESSIONAL SERVICES 2019 | CONSTRUCTION *(IF APPLICABLE)* N/A

(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE ☒ Check if project performed with current firm
Lead Environmental/Soil Scientist. Analyzed the development of restoration strategies and management activities that reestablished sheetflow and rainfall driven hydroperiods to improve the function of both terrestrial and aquatic habitats within the 34 square mile wildlife management area.

c.

(1) TITLE AND LOCATION *(City and State)*
J.W. Corbett Wildlife Management Area Hydrologic Assessment, Palm Beach County, FL

(2) YEAR COMPLETED: PROFESSIONAL SERVICES 2016 | CONSTRUCTION *(IF APPLICABLE)* N/A

(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE ☒ Check if project performed with current firm
Senior Hydrogeologist/Senior Biologist. Assess ecohydrology of the wetland/upland landscape mosaic of the J.W. Corbett Wildlife Management Area (WMA). Conduct field measurement of current hydrology and vegetation. Estimate predevelopment hydrology and vegetation from historical sources. Complete critical evaluation of modeling of regional surface and groundwater hydrology of Corbett WMA and surroundings. Estimate recommended water management changes.

d.

(1) TITLE AND LOCATION *(City and State)*
Woodchip Bio-Retention of Total Nitrogen Pilot Project, City of Bonita Springs, FL

(2) YEAR COMPLETED: PROFESSIONAL SERVICES 2015 | CONSTRUCTION *(IF APPLICABLE)* N/A

(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE ☐ Check if project performed with current firm
Senior Scientist. Analyze peer-reviewed and gray literature on woodchip bio-reactors to evaluate feasibility and develop design of carbon-enriched, anaerobic reactors to remove nitrate from stormwater runoff for the Imperial River Watershed pursuant to the Everglades West Coast Basin Management Action Plan for the City of Bonita Springs.

e.

(1) TITLE AND LOCATION *(City and State)*
Landscapes and Hydrology of the Pre-drainage Everglades, West Palm Beach, FL

(2) YEAR COMPLETED: PROFESSIONAL SERVICES 2011 | CONSTRUCTION *(IF APPLICABLE)* N/A

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

Lead Modeler. Co-author (on behalf of the South Florida Water Management District in cooperation with the Everglades National Park) a pivotal paper that shifted the focus of hydrologic restoration from water depths to the actual movement of water. Demonstrate through this analysis (published by the Science Coordinating Team) the link between absence of flow and loss of characteristic Everglades vegetation and geomorphology.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
M. Zaki Moustafa, Ph.D.	**Principal Modeler, QA/QC**	37	7

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

South Florida Engineering and Consulting LLC, Lake Worth Beach, FL

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*
Ph.D., Oceanography, Hydrodynamic & Water Quality Modeling M.A., Physical Oceanography	State of Florida: Ph.D. Oceanography, Hydrodynamic & Water Quality Modeling

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

1) Moustafa and Wang, 2020. Assessment of Wind and Vegetation Interactions in Constructed Wetlands. 2) Moustafa et al., 2024. Impacts of Freshwater Sources on Salinity Structure in a Large, Shallow Estuary 3) Moustafa and Lal, 2024. Phosphorus Retention in Treatment Wetlands? A Field Experiment Approach: Part 1, Hydrology. 4) Moustafa and Lal, (in review). Phosphorus Retention in Treatment Wetlands? A Field Experiment Approach: Part 2, Water Quality. 5) Zhen-Gang, Moustafa, and Hamrick, 2024. Hydrodynamic Modeling of a Large, Shallow Estuary 6) Lal, and Moustafa, 2016. Dam-Break Wave Fronts in Vegetated Wetlands. 7) Lal, Moustafa, and Wilcox 2015. The use of discharge perturbations to understand in situ vegetation resistance in wetlands. 8) Moustafa, Lal, and Wilcox, 2014. Estimates of in-situ vegetation resistance in large, constructed wetlands.

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*: **SFWMD, C-51 Sediment Trap Assessment Project, West Palm Beach, FL**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: 2019 — CONSTRUCTION *(IF APPLICABLE)*: N/A

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

Principal Scientist. The C-51 Sediment Trap project is part of restoration efforts included in the Lake Worth Lagoon Management Plan and the CERP. The objectives are to characterize soils for contaminants and analyze the efficiency of the sediment trap during current and future flow conditions. SFEC collected necessary flow and stage data at the coastal structure and analytical data from canal sampling to estimate sediment loading. Data collected were used to estimate current sediment trap efficiency, and the level of service (flood protection) expected in future flow conditions under rising stage-elevation at coastal structure. Collect accumulated sediment samples and determine the concentrations of contaminants present.

b.

(1) TITLE AND LOCATION *(City and State)*: **SFWMD, WO6 - FPLOS (Flood Protection Level of Service) Assessment for Current and Future Conditions in C-111 Coastal, C-111 South, C-111 AG, Model Land, and L-31NS Watersheds, Miami-Dade County, FL**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: 2022 — CONSTRUCTION *(IF APPLICABLE)*: N/A

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

QA/QC Officer. Assisted SFWMD in conducting system-wide review of water management infrastructure to determine the flood protection level of service being provided by existing infrastructure under current and future conditions. Major work products from this study are additional model development and conceptualization; calibrated and validated hydrologic and hydraulic models; assessment of existing level of flood protection and of future sea level scenarios flood protection; and Storm Surge and Tidal Boundary Conditions under Current and Future Sea Level Conditions. Cost: $596,270.91

c.

(1) TITLE AND LOCATION *(City and State)*: **AECOM Compass FEMA erosion modeling support, West Palm Beach, FL**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: 2023 — CONSTRUCTION *(IF APPLICABLE)*: N/A

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

Project Manager. SFEC is a subcontractor for AECOM/Compass providing technical support to FEMA's Risk Mapping, Assessment, and Planning Program. SFEC's role was to provide GIS and data review services and prepare input data needed to execute the computation of erosion hazards. 3 task orders to date. Cost: $87,315.12

d.

(1) TITLE AND LOCATION *(City and State)*: **Sustainable Landscape and Treatment in a Stormwater Treatment Area Study, Palm Beach County, FL**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: 2024 — CONSTRUCTION *(IF APPLICABLE)*: N/A

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

Principal Modeler/Scientist. P removal in STAs is accomplished via two processes: 1) biological /chemical processes that remove P from the flow path, which is not in "human-control," and 2) physical processes of transport and mixing (diffusion & dispersion) that are in "human-control" & determines wetland's area that can be used to improve P retention and sustain healthy vegetation community. This project intends to achieve sustainability of low

	P outflow concentrations & healthy vegetation, while maintaining controllability of flow, water depth, and water slope in STAs. Cost $618,187.42		
e.	(1) TITLE AND LOCATION *(City and State)* **Dupuis Seepage Study, Palm Beach County, FL**	(2) YEAR COMPLETED PROFESSIONAL SERVICES Ongoing	(2) YEAR COMPLETED CONSTRUCTION *(IF APPLICABLE)* N/A
	(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE ☒ Check if project performed with current firm **Principal Scientist.** The main objective of this study was to provide up-to-date information regarding water levels (stage) and estimates of seepage volume and directions among major landscape areas near DuPuis Management Area through extensive data collection of field observations and analysis. Final recommendations regarding seepage management and pump operations will be provided based on the new data analysis and results, as well as other available information from previous near-by studies (i.e., L-8 Canal and Structure S76). Cost: $35,200		
f.	(1) TITLE AND LOCATION *(City and State)* **NRCS Wetland Determinations, FL**	(2) YEAR COMPLETED PROFESSIONAL SERVICES 2024	(2) YEAR COMPLETED CONSTRUCTION *(IF APPLICABLE)* N/A
	(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE ☒ Check if project performed with current firm **Principal Scientist.** Part of the SFEC team that provides wetland determinations through NRCS to agricultural producers, to aid in compliance with the wetland conservation provisions of the Food Security Act of 1985. Evaluate soils, vegetation and hydrologic indicators. Evaluate hydraulic conductance of soils. Provides QAQC review of reports and forms.		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Georgio Tachiev, PE PHD	**Senior Hydrodynamic Modeler**	30	8

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

South Florida Engineering and Consulting LLC, Lake Worth Beach, FL

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*
PhD - Water Resources and Environmental Engineering, Vanderbilt University, TN MS - Chemical Engineering, Vanderbilt University, TN BS - Civil Engineering, VIAS, Sofia Bulgaria	Professional Engineer, FL, #67520

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

Publications: 40 peer review publications in Water Resources, Hydrology, Remediation, Computer Science, Organizations: EWRE chapter of ASCE, Miami, Training: Project Management, and Princeton Remediation Course

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*
Scour Depth Analysis of Proposed Seawall
Haulover Cut Inlet, Florida

(2) YEAR COMPLETED	
PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2016	2016

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

Prime Model Developer. Developed a 2D hydrodynamic model to analyze and predict design scour depths along the north and south seawalls, within FDOT right of way for the SR A1A bridge at the south and north sections of the Haulover Cut Inlet. The height from the top of the existing seawall to the top of the mudline is approximately 16.5 feet at the south abutment, and approximately 16.7 feet at the north abutment and the total length seawalls to be replaced is approximately 240 linear feet, approximately 120 feet at each abutment. $142,000

b.

(1) TITLE AND LOCATION *(City and State)*
Hydrodynamic model and scouring investigation of an FDOT bridge and fender system relocation, Seven Mile Bridge Key West, FL

(2) YEAR COMPLETED	
PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2016	2026

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

Prime Model Developer. Developed a 2D hydrodynamic model to analyze, predict to compare the design scour depths in the vicinity of the existing and proposed fender systems of the Seven Mile Bridge, Key West Florida. The proposed rehabilitation of the fender system has a shape which is similar to the existing fender system, however, the new fenders are elongated approximately 9.5 feet in each direction along the Moser Channel. In longitudinal direction the old fender system is 169.5 feet long, while the new fender system is 190 feet long which is an increase of 12.5 % with respect to the old fender system. This elongation can potentially modify the flows, the scour patterns and rates through the channel and in proximity to the bridge piers during tidal and storm surge action, and this project provides a comparative analysis of the current and proposed fender systems with a focus on scour extent. $112,000.

c.

(1) TITLE AND LOCATION *(City and State)*
S-71 Spillway Structure Replacement Preliminary Design Project
Glades County, Florida

(2) YEAR COMPLETED	
PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2024-2025	

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

Principal Modeler. Prepare the hydraulic design calculations and perform hydraulic 3D (computational Fluid Dynamic (CFD) modeling within the limits of the Project, including design of canals, pump station, boat lock, and water control structures. Perform a frequency analysis of hydrological and hydraulic data based on the historical discharge and water stage data of the S71 spillway, as well as the operational requirements of the new structure, to provide boundary conditions for the hydrostructure design and CFD model study. Utilyze Ansys Fluent Flow or Flow Science Flow 3D software and 3D nonhydrostatic Reynolds-Averaged-Navier-Stokes (RANS) model with turbulence closure software should be used in the model study. In addition to the general requirements of velocities, depth, and flow pattern studies, additional requirements for the CFD model preliminary study include:
a) Compare and select the general layout, including the location and geometry of the spillway, pump

station, ship lock, and splitting island. b) Verify the design flow capacity of S-71 discharge structures under minimum head differential conditions. c) Conduct a preliminary study of the potential occurrence of surface/subsurface vortices and their impact on the hydraulic performance of the intake structure, as well as collect the frequency of hydrodynamic exciting forces for potential structural vibration analysis. d) Design energy dissipation, downstream erosion protection, and riprap design under maximum head differential conditions. e) Evaluate the confluence alignments, approach angles, changes in bend radii, changing invert elevations, and adding flow vanes, etc. f) For ship lock structures, similar to S-71 spillway, consider their discharge capacity, erosion control, and the impact of complex turbulent flow on discharge at the confluence and/or junctions, including potential biased approaching flow. ($221,540)

d.

(1) TITLE AND LOCATION *(City and State)*
Update of Stormwater Master Plans for Miami-Dade County
Miami Dade County, Florida

(2) YEAR COMPLETED	
PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2021	

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

Principal Engineer for the Update of Miami Dade County's stormwater models of Basins C1, C2, C3, C4, C5 C6, C7, C8, C9, C103. QA/QC Reviewer for the update of basins C100, C102 and C111. Developed the required information for the CRS submittal of Miami-Dade County in 2020 and 2023

e.

(1) TITLE AND LOCATION *(City and State)*
Groundwater Modeling for L-8 FEB (SFWMD)
Miami Dade County, Florida

(2) YEAR COMPLETED	
PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2015	

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

Developed a groundwater model using MODFLOW/GWVISTAS to assess the effect of L-8 FEB project operations on groundwater elevations adjacent to the project Developed transient calibration, verification and scenario runs to determine the impacts of reservoir operation on adjacent lands.

f.

(1) TITLE AND LOCATION *(City and State)*
Stormwater Treatment Area 1W (STA-1W) Expansion Project Watershed Hydraulic Study (SFWMD), South Florida

(2) YEAR COMPLETED	
PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2014	

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

Developed & coupled the 2D MIKE FLOOD model, which couples to MIKE 11 with the 2D overland flow capabilities of MIKE21. He integrated the MIKE 11 model with the 2D model and conducted model calibration and verification. He developed a transport model which shows the flow of a conservative tracer through the system to provide analysis of potential short-circuiting.

g.

(1) TITLE AND LOCATION *(City and State)*
Engineering Services for Culvert Repair for Stormwater Treatment Area STA-1E, USACE

(2) YEAR COMPLETED	
PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2010	2017

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

Engineering services for Culvert Repairs in Stormwater Treatment Area STA-1E, West Palm Beach, design of dewatering plans, earthen and sheetpile cofferdam design, geotechnical analysis hydrology, operation schedules of gates and pumps. Size: 7,000 acres, Constructuon Cost Cost: $56M, Specific Role: Principal Engineer

h.

(1) TITLE AND LOCATION *(City and State)*
Development of Hydrodynamic Model of Florida Bay (NPS)
South Florida

(2) YEAR COMPLETED	
PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2018	

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

Developed a 2D hydrodynamic model of coastal areas in South Florida; compared model results against field measurements to predict tides at selected locations inside and outside the bay. The model was employed to provide analysis of the tidal hydraulics, wind and wave generated currents, storm surges and flood waves.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Mahmoud Madkour, Ph.D., P.E., LEED® AP	Lead Structural Engineer	30	2

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

South Florida Engineering and Consulting LLC, Lake Worth Beach, FL

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State*
Ph.D. / Fisheries-Water Quality / Auburn University, AL. M.C.E / Civil Engineering-Hydrology / Auburn University, AL. B.S.C.E / Structural Engineering / Ain Shams University, Egypt.	Professional Engineer, FL, #48966

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

Certified LEED® AP (BD+C) by the U.S. Green Building Council.
Certified Construction Contracts Administrator (CCCA) by the Construction Specifications Institute (CSI).

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*
Restoration of Historic Mosquito Lagoon Saltmarsh.
New Smyrna Beach, Volusia County, Florida

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2015	2016

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

Engineer Of Record. Designed and permitted the restoration of ~4acres of FWC property in New Smyrna Beach to historic saltmarsh. The project also entailed the construction of a living shoreline stabilization demonstration area with associated educational signage to highlight various industry techniques. The total site footprint including slopes with stabilization features is ~5.2acres. The saltmarsh is being used to support ongoing environmental education and restoration programs in the region.

b.

(1) TITLE AND LOCATION *(City and State)*
Don Pedro Island State Park Hydrologic Restoration
Cape Haze, Charlotte County, Florida

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2015	2015

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

Removal and regrading of an artificial berm within Don Pedro Island State Park. Remove approximately 2.79 acres of spoil material along the 994 foot canal bank.

c.

(1) TITLE AND LOCATION *(City and State)*
East Lake Tohopekaliga Drawdown and Habitat Enhancement Environmental Impact Statement
Osceola County, Florida

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2018	

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

Develop a comprehensive Habitat Management Plan for East Lake Tohopekaliga (Osceola County, Florida). Renovation would include dewatering of the lake (gravity and pump-down), removal of aquatic plant and sediment with heavy equipment, creation of in-lake disposal islands, installation of temporary dam material (e.g., sheet pile material) to isolate sections of the lake, management of aquatic plants using herbicide and prescribed fire, and planting of native vegetation.

d.

(1) TITLE AND LOCATION *(City and State)*
Three Lakes Wildlife Management Area Hydrologic Restoration Fodderstack Slough Improvements
Osceola County, Florida

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2010-2013	2014-2015

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

A 516 foot-long weir, consisting of a single row of epoxy coated steel sheet piles; A concrete control structure equipped with removable aluminum stop log to control Lake Marian stages, as well as two low level bleeders equipped with stainless steel slide gates; the structure is also equipped with an access platform from which stop logs can be lifted and the gates manually operated.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
Michael Adler, M.S.	**Senior Environmental Scientist/GIS Analyst**	a. TOTAL 20	b. WITH CURRENT FIRM 11

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

South Florida Engineering and Consulting LLC, Lake Worth Beach, FL

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*
M.S., Ecological Restoration	Authorized Gopher Tortoise Agent GTA-21-00063 Certified Ecological Restoration Practitioner (SER)

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

Mr. Adler analyzes geo-spatial data to answer questions as well as to produce maps that display data and generate improved understanding. He conducts field biology studies including wetland investigations and forensic wetland investigations, as well as floristic community together with RTK elevation surveys to better understand the ecosystem-hydrology relationship. He also collects soil and water samples according to established protocols.

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*: **East Lake Tohopekaliga Drawdown Environmental Impact Statement (EIS), Osceola County, FL**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: 2019; CONSTRUCTION *(IF APPLICABLE)*: N/A

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

Environmental Scientist & GIS analyst. Participated in drafting the Biological Assessment (BA) for USFWS in accordance with the ESA Section 7 consultation and provided services and expertise in plant identification and plant community characterization, data collection and processing, charting, Threatened and Endangered species surveying and site suitability estimation, development of Environmental Impact Statement (EIS) and response to comments. Conducted GIS analyses and produced maps for inclusion in EIS documents and in presentations to the public, stakeholders and decision makers.

b.

(1) TITLE AND LOCATION *(City and State)*: **Dinner Island Ranch Wildlife Management Area Hydrologic Assessment, Hendry County, FL**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: 2019; CONSTRUCTION *(IF APPLICABLE)*: N/A

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

Environmental Scientist & GIS analyst. Data collection, data processing, charting, plant identification, plant community characterization, Threatened & Endangered Species surveying, and GIS analyses and map development. Helped to develop the habitat and hydrologic restoration plan for the approximately 21,000 acre WMA under SFEC's contract with the Florida Fish and Wildlife Conservation Commission.

c.

(1) TITLE AND LOCATION *(City and State)*: **J.W. Corbett Wildlife Management Area (WMA) Hydrologic Assessment, Palm Beach County, FL**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: 2016; CONSTRUCTION *(IF APPLICABLE)*: N/A

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

Environmental Scientist & GIS analyst. Studied hydrology for the approximately 61,000-acre preserve. Provided services in data collection, data processing/charting, swamp buggy driving, plant identification and plant community characterization, restoration planning, GIS analyses including evaluation of model projections according to performance metrics, map development, report writing, and T&E and invasive species surveying under SFEC's contract with the Florida Fish and Wildlife Conservation Commission.

d.

(1) TITLE AND LOCATION *(City and State)*: **Indrio Savannahs Wet Pond Project, St. Lucie County, FL**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: Ongoing; CONSTRUCTION *(IF APPLICABLE)*: Ongoing

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

Environmental Scientist & GIS analyst. Contributed to ecological field evaluation of site conditions, provided GIS support for study of site and planning, such as development of alternatives for restoration and hydrologic reconnection. Also provided GIS support for model development. Made maps for permit application. Wrote revegetation plan.

e.

(1) TITLE AND LOCATION *(City and State)*: **Loxahatchee River Watershed Restoration Project (LRWRP) – Flowway 3, Martin and Palm Beach Counties, FL**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: Ongoing; CONSTRUCTION *(IF APPLICABLE)*: N/A

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

Environmental Scientist & GIS analyst. Part of team that accomplished field surveys examining vegetation, ecological conditions, and topography, to make recommendations for most beneficial citing of hydrologic conveyances for ecological benefit. Conducted GIS analyses and produced elevation charts of transects.

f.

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

Ancient Oaks STA, St. Lucie County, FL

(2) YEAR COMPLETED	
PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
Ongoing	N/A

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

Environmental Scientist & GIS analyst. Contributed to ecological field evaluation of site conditions, provided GIS support for study of site and planning, such as development of alternatives for conceptual location and configuration of stormwater pond conveyances, and berms. Also provided GIS support for model development including study of existing permits and water flow analysis. Made maps for permit application.

g.

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

Pine Jog Tortoise Survey.FAU Pine Jog Environmental Education Center, Palm Beach County, FL

(2) YEAR COMPLETED	
PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2024	N/A

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

Authorized Agent. Planned and conducted surveys according to FWC standards around buildings and access roads. Derelict structures needed to be demolished, with tortoise burrows nearby. Survey was needed to minimize the number of potentially impacted burrows and plan for relocation & temporary exclusion. Maps and data delivered.

h.

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

AECOM Compass FEMA Erosion Modeling and Support, Martin and Indian River Counties, FL

(2) YEAR COMPLETED	
PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2024	N/A

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

GIS Analyst. Worked as part of the SFEC GIS team under subcontract to AECOM, to refine and QA/QC geographic data to make data inputs suitable for use in the FEMA coastal erosion modeling tool. As part of this effort, developed a protocol for accomplishing one of the necessary edits to the data.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Tanzina Afrin, M.S.	**Hydrologic Modeler**	20	6

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

South Florida Engineering and Consulting LLC, Lake Worth Beach, FL

16. EDUCATION *(Degree and Specialization)*	
MSc., Civil Engineering (Water Resources) MSc., Water Science and Engineering, Specialization: Hydroinformatics	Professional Engineer, FL, #48966

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

Afrin, 2016: Morphodynamic modeling of a small coastal river during an extreme flood event, 2016 AGU Fall Meeting and Session-EP51A: Fluvial Morphodynamics and Channels Patterns and Beyond I Poster, California, Training on "Coastal Modeling Approaches" at South Florida Water Management District, 2019. Member of ASCE, ASFPM, SAME

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*: **FPLOS (Flood Protection Level of Service) Assessment for Current and Future Conditions in C-111 Coastal, C-111 South, C-111 AG, Model Land, and L-31NS Watersheds, Miami-Dade County, FL**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: 2023; CONSTRUCTION *(IF APPLICABLE)*: N/A

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

Hydrological Modeler. Reviewed and evaluated the existing facilities to identify stormwater system components, which may underperform under the current LOS, and developed sustainable stormwater management solutions considering both existing and future condition with SLR. The LOS analysis is based on results from numerical simulations of watershed hydrology using an integrated surface groundwater hydrologic model, developed with MIKE SHE- MIKE 1D modeling tool.

b.

(1) TITLE AND LOCATION *(City and State)*: **Ancient Oaks STA, St. Lucie County, FL**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: Ongoing; CONSTRUCTION *(IF APPLICABLE)*: N/A

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

Hydrologic Modeler. Modeled, developed, and designed drainage options including water control structures (stormwater pond) as well as other improvements that benefit both water quality, natural storage, and drainage. Provided modeling reports describing expected nutrient removal, and hydrological function for incorporation into the County's BMAP.

c.

(1) TITLE AND LOCATION *(City and State)*: **AECOM Compass FEMA Erosion Modeling and Support, Martin and Indian River Counties, FL**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: 2023; CONSTRUCTION *(IF APPLICABLE)*: N/A

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

GIS Analyst. Involved with Risk Mapping Program of the Federal Emergency Management Agency (FEMA) with AECOM/Compass to provide technical support in the Risk Mapping, Assessment, and Planning Program. Specific responsibility refers to expanding binary coastal erosion hazard information into a graduated hazard and damage information source capitalizing on existing FEMA methodologies, specifically, transect and SWEL compilation. Used the ArcGIS tool for this project.

d.

(1) TITLE AND LOCATION *(City and State)*: **Loxahatchee River Watershed Restoration Project (LRWRP) – Flowway 3, Martin and Palm Beach Counties, FL**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: Ongoing; CONSTRUCTION *(IF APPLICABLE)*: N/A

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

Hydraulic modeler. Client, South Florida Water Management District (SFWMD) project to improve the quantity, quality, timing, and distribution of water flows to and within the Everglades system. LRWRP will improve water flows to the Northwest Fork of the Loxahatchee River and to restore the connectivity of wetlands and watersheds that form the river headwaters to ensure the appropriate hydrological conditions to support healthy flood plain vegetation. Seven different 1D/2D coupled hydraulic models are being developed under this project with HECRAS software at this stage to fix the structural design of the proposed structures and to evaluate the flooding as well as backwater impact.

e.

(1) TITLE AND LOCATION *(City and State)*: **STA- 5/6 Connection to Lake Okeechobee – Phase 1, Hendry County, FL**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: 2020; CONSTRUCTION *(IF APPLICABLE)*: 2020

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

Hydrologic Modeler. Involved in South Florida Water Management District (SFWMD) with main consultant CDM Smith as hydraulic modeler. The study is the subsequent study of a feasibility study of developing conceptual designs to move Lake Okeechobee water south for treatment within Stormwater Treatment Area (STA)-5/6 and eventual delivery to benefit the Everglades. Accomplished H& H modeling with HEC-RAS 1D for designing of the proposed project features (number of barrels, size and length of the proposed box culvert, invert elevations, headwater & tailwater elevations, discharge rates, upstream and downstream bottom widths and elevations, side slopes and grade break elevations, flow velocities, design high water and low water elevations) of the interim and permanent pump stations, box culvert, bridge, STA-5/6 North Seepage Ditch and Outfall Ditch into the L-2/L-3 Canal.

f.

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

SFWMD WO No. 15: Vertical Datum Upgrade Implementation in Operations and SCADA, South FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2020	N/A

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

Hydraulic Modeler. Established the offsets for South Florida Water Management District (SFWMD) sites, benchmarks, and structures. Performed error analysis of offsets by comparing surveyed offsets with generated offsets using the COPRSCON program. Created an inventory of each SFWMD site with corresponding SCADA offsets, documented Regulation Schedules for 17 large water basins, wrote reports and completed other tasks as required under the Professional Engineering Services Work Order Contract with SFEC. This project is needed for the National Spatial Reference System, as the National Geodetic Survey is replacing the North American Datum of 1983 (NAD 83) and the North American Vertical Datum of 1988 (NAVD 88) with a new geometric reference frame and geopotential datum.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Daljit Sandhu, E.I., Ph.D.	**Water Resources Engineer**	9	6

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

South Florida Engineering and Consulting LLC, Lake Worth Beach, FL

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*
Ph.D., Civil Engineering M.S., Civil Engineering – Water Resources B.S., Civil Engineering	Engineer Intern (EI) – FL American Geophysical Union (AGU) American Society of Civil Engineers (ASCE) Environmental Water Resources Institute (EWRI)

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

Sandhu, D., et al., (2020). Can we infer the age of karst conduit from the profile of potentiometric surface? Journal of Hydrology, 584, 124679.
Sandhu, D., et al., (2018). Fate and transport of radioactive gypsum stack water entering the Floridan aquifer due to a sinkhole collapse. Nature, Scientific Reports, Vol. 8, Article 11439.
Sandhu, D., et al., (2016). Hydro-geomorphic response of Everglades to changing climate and anthropogenic activities. Journal of Hydrology, Vol. 543, 861-872.
Adjunct Lecturer/Graduate Teaching Assistant

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*
Ancient Oaks STA, St. Lucie County, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
Ongoing	N/A

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

Water Resources Engineer. Currently providing engineering support for construction. Performed the design of stormwater pond and swales to improve quality of water draining through this county park, toward the St. Lucie River. Provided permitting support. Developed design plans that were used for environmental resource permitting with SFWMD and construction bid documents.

b.

(1) TITLE AND LOCATION *(City and State)*
AECOM Compass FEMA Coastal – Graduated Erosion Project, Martin and Indian River Counties, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2023	N/A

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

GIS Analyst. Provided technical support for FEMA's Risk Mapping, Assessment, and Planning Program. Reviewed raw flood and erosion GIS shapefile data for Martin and Indian River counties. GIS data were corrected as required by AECOM prior to computing erosion hazards.

c.

(1) TITLE AND LOCATION *(City and State)*
FPLOS (Flood Protection Level of Service) Assessment for Current and Future Conditions in C-111 Coastal, C-111 South, C-111 AG, Model Land, and L-31NS Watersheds, Miami-Dade County, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2023	N/A

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

Water Resources Engineer. Provided engineering support for the modeling of six (6) South Florida watersheds for evaluating flood protection level of service (FPLOS) in collaboration with the SFWMD. Assisted in providing potential mitigation solutions based on modeling results. Documented meeting minutes at each meeting.

d.

(1) TITLE AND LOCATION *(City and State)*
Dupuis Seepage Project, Palm Beach County, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
Ongoing	N/A

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

Water Resources Engineer. Currently providing engineering and GIS support for the installation of monitoring wells to monitor and analyze water level stages and flow across SFWMD pumping operations.

e.

(1) TITLE AND LOCATION *(City and State)*
Boynton Beach Lake Ida Water Quality Monitoring Project, Boynton Beach, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
Ongoing	N/A

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

Water Resources Engineer. Provides rainfall analysis in support for the water quality monitoring analysis for Lake Ida in Boynton Beach. Rainfall statistics and frequency analysis are computed to explain ongoing water quality trends.

f.

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

Work Order (WO) 15: Vertical Datum Upgrade Implementation in Operations and SCADA, West Palm Beach, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2020	N/A

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

Water Resources Engineer. Provided engineering support for the programming and automation component of the Vertical Datum Upgrade Project at the South Florida Water Management District (SFWMD). Provided updates to regulation schedules and elevation related reports.

g.

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

Karst Conduit Simulation in Silver Springs – University of Central Florida, Orlando, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2019	N/A

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

Graduate Research Assistant. Graduate Research Assistant – Using available hydrogeologic and hydraulic data for the Upper Floridan Aquifer, the simulation of karst conduit evolution within the Silver Springs springshed in Ocala, FL, was modeled as part of a research project.

h.

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

Implications of Radioactive Water into the Floridan Aquifer to Drinking Water Supplies – University of Central Florida, Orlando, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2018	N/A

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

Graduate Research Assistant. Provided research modeling services as part of a National Science Foundation (NSF) project, the objectives were to model the transport behavior of contaminated water in the Floridan aquifer following a sinkhole event to see if drinking water quality criteria were met, and to observe if mineral adsorption can help limit the distance traveled by the contaminant plume, based on hydrologic, hydraulic, and chemistry conditions of the Floridan aquifer.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Ellen A. Ashford	**Biologist**	12	6

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

South Florida Engineering and Consulting LLC, Lake Worth Beach, FL

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*
B.S., Biology	

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

Professional Membership:
Project Management Institute
The Wildlife Society
Florida Association of Environmental Professionals

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*
East Lake Tohopekaliga Drawdown Environmental Impact Statement (EIS), Osceola County, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2019	N/A

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

Biologist. Supported community outreach to convey project goals and objectives and supported public meetings to collect stakeholder input. Project supported FWC obtaining a permit from USACOE to conduct a drawdown, muck-scraping, and other habitat management activities in East Lake Tohopekaliga.

b.

(1) TITLE AND LOCATION *(City and State)*
Loxahatchee River Watershed Restoration Project (LRWRP) – Flowway 3, Martin and Palm Beach Counties, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
Ongoing	N/A

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

Environmental Scientist. Part of team that accomplished field surveys examining vegetation, ecological conditions, and topography using Real Time Kinematic equipment (RTK).

c.

(1) TITLE AND LOCATION *(City and State)*
SFWMD - C-51 Sediment Trap Study, West Palm Beach, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2021	N/A

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

Field Tech. Conducted water quality sampling with appropriate FDEP protocols for nutrients and selected semi-volatile contaminants.

d.

(1) TITLE AND LOCATION *(City and State)*
FY2024 SEFR Permit Report Technical Support, Multiple Locations, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2024	N/A

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

Biologist. Provided scientific support services for data analysis and preparation of annual permit reports. Under this Agreement, SFEC, provided SFWMD with technical support for Lakeside Ranch Stormwater Treatment Area (LRSTA), the C-111 Spreader Canal (C-111 SC), the C-44 Stormwater Treatment Areas (C-44 STA), and Lake Hicpochee.STA.

e.

(1) TITLE AND LOCATION *(City and State)*
FDEP - Savannas Preserve State Park Hydrologic Restoration Project, Jensen Beach, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2021	N/A

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

Field Tech. Assisted in site assessment for environmental review used to obtain Environmental Resource Permit. The site assessment including, survey points, vegetation, and habitat type supported the design of three (3) low water crossing and five (5) ditch plugs and two (2) partial ditch fills intended to restore historic sheetflow and extend dry season hydroperiods.

(1) TITLE AND LOCATION *(City and State)* (2) YEAR COMPLETED

		PROFESSIONAL SERVICES Ongoing	CONSTRUCTION *(IF APPLICABLE)* N/A
f.	(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE ☒ Check if project performed with current firm **Field Tech.** Field sampling and lab support for several Restoration Strategies Science Plan studies conducted by the Water Quality Treatment Technologies team. Assists to pre and post calibrate and conduct monthly maintenance of remote sensing equipment including EXO Multiparameter Sondes, Onset Hobo light sensors, and Onset Level Loggers located in various Stormwater Treatment Areas.		
g.	(1) TITLE AND LOCATION *(City and State)* **SFWMD - Spatial Soil Sampling in the C-44 and Lakeside Ranch Phase II Stormwater Treatment Areas and the Ten Mile Creek Water Preserve Area, St. Lucie County, FL**	(2) YEAR COMPLETED PROFESSIONAL SERVICES 2023	CONSTRUCTION *(IF APPLICABLE)* N/A
	(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE ☒ Check if project performed with current firm **Field/LabTech.** Participated in field sampling and laboratory processing of soil samples from multiple STAs. Laboratory analyses included pH, loss on ignition, and bulk density analysis.		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Thomas Prevratil	**Scientific Technician II**	13	5

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

South Florida Engineering and Consulting LLC, Lake Worth Beach, FL

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*
B.S., Biology	

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

Bronze Star Medal Recipient (x3), Army Special Forces qualified
Memberships: Emergency Management Institute

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*: **Dispersed Water Management Program Monitoring Services for Northern Everglades Public Private Partnership Projects, Southern Central, FL**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: Ongoing; CONSTRUCTION *(IF APPLICABLE)*: N/A

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

Scientific Technician. Caulkins Farm Dispersed Waters Program, Indian Town, FL. Caulkins Water farm is part of the Florida Dept. of Environmental Protection (FDEP) dispersed waters program. Set up telemetry, collected well data for analysis, and collected water quality grabs when inflow pumps are operating. Brighton Valley Dispersed Waters Program, Okeechobee, FL. Brighton Valley Dispersed Waters Program is part of the Florida Dept. of Environmental Protection (FDEP) dispersed waters program. Set up 5 autosamplers for surface water analysis and collected water quality grabs when inflow pumps are operating. Bluefield Water Farm Dispersed Waters Program, Okeechobee, FL. Bluefield water farm Dispersed Waters Program is part of the Florida Dept. of Environmental Protection (FDEP) dispersed waters program. Set up 2 autosamplers for surface water analysis and collected water quality grabs when inflow pumps are operating. Scott Water Farm Dispersed Waters Program, Okeechobee, FL. Scott water farm Dispersed Waters Program is part of the Florida Dept. of Environmental Protection (FDEP) dispersed waters program. Set up 2 autosamplers for surface water analysis and collected water quality grabs when inflow pumps are operating.

b.

(1) TITLE AND LOCATION *(City and State)*: **SFWMD - Sustainable Landscape and Treatment in a Stormwater Treatment Area Study, Palm Beach County, FL**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: 2024; CONSTRUCTION *(IF APPLICABLE)*: N/A

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

Scientific Technician. Conducted repairs and renovations of experimental site after inadequate initial construction to prevent leaks and accomplish necessary functionality. Conducted experimental runs. Programmed data loggers and collected data. Collected water samples for analysis.

c.

(1) TITLE AND LOCATION *(City and State)*: **City of Boynton Beach - Lake Ida Monthly Water Quality Monitoring for Municipal Separate Storm Sewer System (MS4) TMDL, Boynton Beach, FL**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES; CONSTRUCTION *(IF APPLICABLE)*

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

Scientific Technician. Coordinates project specific needs with partnering NELAC certified laboratory. Provides surface water collection by following standard operating procedures of the Florida Department of Environmental Protection (DEP) Florida Statue (FS) 2110 (Surface Water Sampling). Also helps to collect and organize rainfall data for monthly and quarterly reports.

d.

(1) TITLE AND LOCATION *(City and State)*: **SFWMD Ecology and Environmental Scientific and Technology Support Services, Work Order 8, South FL**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES; CONSTRUCTION *(IF APPLICABLE)*

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

Scientific Technician. Supported the WQM Field Operations and Sampling Logistics teams with monitoring programs throughout the SFWMD's geographic area through the collection of manual and electronic surface water quality and ecological and biological samples. Operated, calibrated, and maintained field instrumentation and equipment including automatic water sampling equipment, multi-parameter water quality instruments, boats, vehicles, and GPS. Collected field data and samples. Documented field conditions and/or data utilizing Horizon Field Data Management (HFDM) software on field computers.

(1) TITLE AND LOCATION *(City and State)* — (2) YEAR COMPLETED

e.	**Field Scientist II – DB Environmental Inc., FL**	PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
	(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE ☐ Check if project performed with current firm **Field Scientist II.** Monitoring, testing, and collecting water, soil, and organic samples to improve the water quality discharging into the Everglades using established protocols. Conducted test well site monitoring. Record field data; updating and maintaining data files using MS Excel; and administrative tasks that support general operations. Ability to work effectively under adverse field/weather conditions, lift over 50 lbs. Experience working with Florida Department of Environmental Protection (FDEP). Standard Operating Procedures (SOP) for Field Activities (DEP-SOP-001/01), and experience in following quality control/quality assurance (QA/QC) protocols. Hundreds of hours of experience piloting airboats through dense vegetation while pinpointing GPS points to within 20 feet of determined destination. Capable of calibrating multiple pH meters, EXO II SONDE's, reduction-oxidation meters, light meters, dissolved oxygen meters, and turbidimeter. Quickly and positively identify South Florida's wetland submerged, floating, and emergent vegetation and fauna. Maintained two airboats with trailers, three 4x4 trucks, and a 19' skiff with trailer. Designed and built many abstract devices required for field events. Assisted in design, built, monitored, and trouble shot several studies' structures including but not limited to Chara at S5A and South Site (SFWMD), Lily study in the STA's, Mercury study with U. Purpurea in WCA 3. Has plethora of hours sampling for mercury with "clean hands, dirty hands" without a single contaminated field blank. Installed and replaced several water pumps up to 3-phase 440 volts.		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
K. Sue Byrd	**Lead Technical Editor**	27	6

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

South Florida Engineering and Consulting LLC, Lake Worth Beach, FL

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*

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

Multiple Environmental Impact Statements, Environmental Analyses, Biological Assessment, CERP Report to Congress. Member of U.S. Army Corps of Engineers 2009 C-111 Spreader Canal Project Delivery Team of the Year

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*
East Lake Tohopekaliga Drawdown Environmental Impact Statement (EIS), Osceola County, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2019	N/A

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

Lead Technical Editor. Provided technical editing, formatting, document compilation and configuration management for this Environmental Impact Statement (EIS) and Biological Assessment (BA) draft and final documents including appendices. An EIS outlines the impact of a proposed project on its surrounding environment. The purpose of a BA is to evaluate the potential effects of the action on listed and proposed species and designated and proposed critical habitat and determine whether any such species or habitat are likely to be adversely affected by the action. These and other documents and actions were coordinated with the USACE Jacksonville District and USACE Regulatory Division, Cocoa Permits Section for the proposed East Lake Tohopekaliga Drawdown and Habitat Enhancement Project in Florida's Kissimmee Chain of Lakes region. Managed reviewer comments for document and developed comment response table. Designed cover page for document and appendices. Maintained Administrative Record for project.

b.

(1) TITLE AND LOCATION *(City and State)*
ITC Lake Erie Clean Power Connector Project Environmental Assessment for the U.S. DOE, Office of Electricity Delivery and Energy Reliability, Washington, DC

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2016	N/A

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

Lead Technical Editor. Provided technical editing, formatting, document compilation and configuration management, and version management for the Environmental Assessment (EA) draft and final documents. Developed and managed the comments and responses. The EA proposed a 1,000 megawatt (MW), bi-directional, high-voltage direct current (HVDC) underwater transmission line that would provide the first direct link between the markets of the Ontario Independent Electricity System Operator (IESO) and PJM Interconnection, LLC (PJM). The transmission line will enable transmission customers to efficiently access energy and capacity.

c.

(1) TITLE AND LOCATION *(City and State)*
Environmental Impact Statement, Sumter National Forest Stream Restoration U.S Forest Service, Sumter, SC

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2014	N/A

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

Lead Technical Editor. Served as lead technical editor responsible for editing, formatting, configuration management, document compilation, managing reviewer comments and designing cover page for document and appendices, This EIS was for a project in Sumter National Forest, South Carolina for approximately 100,000 linear feet of stream restoration activities in five watersheds. This project had a one-year start to finish National Environmental Protection Act process.

d.

(1) TITLE AND LOCATION *(City and State)*
Biscayne Bay Coastal Wetlands Phase 1 Draft and Final Integrated Project Implementation Report and Environmental Impact Statement, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2012	N/A

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

Lead Technical Editor. This USACE document consisted of six volumes. The project proposed redistribution of freshwater flow across a broad front that was expected to help restore saltwater wetlands and nearshore bay habitat. Served as lead technical editor responsible for editing, formatting, document compilation, and configuration management. Managed reviewer comments for document and developed comment response table. Designed cover page for main document and appendices.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Jose M. Cruz	**Field Technician II**	6	6

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

South Florida Engineering and Consulting LLC, Lake Worth Beach, FL

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*
Suncoast High School	

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

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*
Dispersed Water Management Program Monitoring Services for Northern Everglades Public Private Partnership Projects, Southern Central, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
Ongoing	N/A

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

Field Tech. Providing technical assistance in the use of telemetry and ground water sampling. Responsible for weekly water quality surface sampling (VanDorn), installation and maintenance of autosamplers, LoggerNet data downloads, and quarterly reporting.

b.

(1) TITLE AND LOCATION *(City and State)*
City of Boynton Beach - Lake Ida Monthly Water Quality Monitoring for Municipal Separate Storm Sewer System (MS4) TMDL, Boynton Beach, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2023	N/A

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

Field Tech. Coordinates project specific needs with partnering NELAC certified laboratory. Provides surface water collection by following standard operating procedures of the Florida Department of Environmental Protection (DEP) Florida Statue (FS) 2110 (Surface Water Sampling). Also helps to collect and organize rainfall data for monthly and quarterly reports.

c.

(1) TITLE AND LOCATION *(City and State)*
SFWMD - Spatial Soil Sampling in the C-44 and Lakeside Ranch Phase II Stormwater Treatment Areas and the Ten Mile Creek Water Preserve Area, St. Lucie County, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2023	N/A

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

Lab Tech. Processed weekly soil samples for pH, Loss on Ignition, and Bulk Density analysis.

d.

(1) TITLE AND LOCATION *(City and State)*
SFWMD - Sustainable Landscape and Treatment in a Stormwater Treatment Area Study, Palm Beach County, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2024	N/A

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

Field Tech. Ecological monitoring during construction activities for flume installation. Responsible for maintenance and tracking of monitoring equipment and weather station. Collection of water quality samples and physical parameters on site.

e.

(1) TITLE AND LOCATION *(City and State)*
FDEP - Savannas Preserve State Park Hydrologic Restoration Project, Jensen Beach, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(IF APPLICABLE)*
2021	N/A

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

Field Tech. Assisted in site assessment for environmental review used to obtain Environmental Resource Permit. The site assessment including, survey points, vegetation, and habitat type supported the design of three (3) low water crossing and five (5) ditch plugs and two (2) partial ditch fills intended to restore historic sheetflow and extend dry season hydroperiods.

(1) TITLE AND LOCATION *(City and State)* (2) YEAR COMPLETED

f.	**SFWMD - C-51 Sediment Trap Study, West Palm Beach, FL**	PROFESSIONAL SERVICES 2021	CONSTRUCTION *(IF APPLICABLE)* N/A
	(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE ☒ Check if project performed with current firm **Field Tech.** This project is part of restoration efforts included in the Lake Worth Lagoon Management Plan and the Comprehensive Everglades Restoration Plan. The objectives were to characterize soils for contaminants and analyze the efficiency of the sediment trap during current and future flow conditions. Under SFEC contract, provided technical assistance to collect necessary stage at the coastal structure and analytical data from canal sampling to estimate sediment loading. Data collected are used to estimate current sediment trap efficiency, and the level of service (flood protection) expected in future flow conditions and under rising stage-elevation at coastal structure.		

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

21. TITLE AND LOCATION (City and State)	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (if applicable)
Environmental Impact Statement (EIS) East Lake Tohopekaliga Drawdown and Habitat Enhancement, Osceola County, FL	2017	2019

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Florida Fish and Wildlife Conservation Commission (FWC)	Tim Coughlin	(407) 846-5247 Tim.Coughlin@myfwc.com

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

Project Summary
Contract Number: 17098
Cost: $353,179

East Lake Tohopekaliga (ELT) is an approximately 12,000-acre lake located in Florida's Kissimmee Chain of Lakes. Aquatic habitat in ELT had deteriorated due to water level stabilization and pollution from watershed development. Exotic, invasive plant density and biomass were observed, as was muck sediment in the littoral zone. The Florida Fish and Wildlife Conservation Commission (FWC) sought authorization from the U.S. Army Corps of Engineers (USACE), Jacksonville District Regulatory Division, to temporarily drawdown ELT to enhance littoral zone habitat by removing muck and undesirable vegetation. SFEC was contracted to support the federal Environmental Impact Statement (EIS) process. FWC was able to draw down ELT from 57.0 to 53.0 NGVD feet and complete desired habitat restoration.

Key Project Elements:
- ✓ USACE EIS and NEPA Process
- ✓ Data Collection
- ✓ Endangered Species Biological Assessment for US FWS Biological Opinion
- ✓ Project Alternatives

SFEC evaluated soil and muck distribution throughout the littoral zone and characterized the littoral zone plant community structure. Data collection allowed for development of more refined, spatially explicit project alternatives that lowered project costs, reduced impacts and provided greater opportunity for habitat enhancement, while also meeting other project specific goals such as improving sport fish habitat and minimizing impacts to recreation. Once data gaps were filled, SFEC supported the FWC and USACE in development of the Draft and Final EIS reports. SFEC also developed the Endangered Species Biological Assessment in support of the U.S. Fish and Wildlife Service's Biological Opinion for the proposed project.

The Draft EIS was prepared in accordance with National Environmental Policy Act (NEPA), Council on Environmental Quality (CEQ) Regulations (40 Code of Federal Regulation [CFR] 1500 et seq.), and USACE provisions for implementing procedural requirements of NEPA (33 CFR 230, USACE Engineering Regulation [ER] 200-2-2). The Draft EIS and Final EIS informed the public and agency decision-makers of project alternatives to avoid or minimize impacts or enhance the quality of the human environment. SFEC supported all aspects of this project including data collection, habitat assessment, review of potential mitigation requirements, public outreach and report synthesis through the Record of Decision.

Project Relevancy
- Drainage and stormwater management systems.
- Numerical modeling of water.
- Engineering/design improvement of water quality/timing/distribution.
- Analysis of water flows, hydrology, hydraulics, structures, and quality.
- Field and laboratory material testing.
- Design services included: design development, construction documentation, sustainability/LEED documentation.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
a.	South Florida Engineering and Consulting LLC	Lake Worth Beach, FL	Prime Consultant

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

21. TITLE AND LOCATION (City and State)	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (if applicable)
J.W. Corbett Wildlife Management Area (WMA) Hydrologic Assessment, Palm Beach County, FL	2016	N/A

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Florida Fish and Wildlife Conservation Commission (FWC)	David Sweetay	(561) 624-6989 Dave.Sweetay@myfwc.com

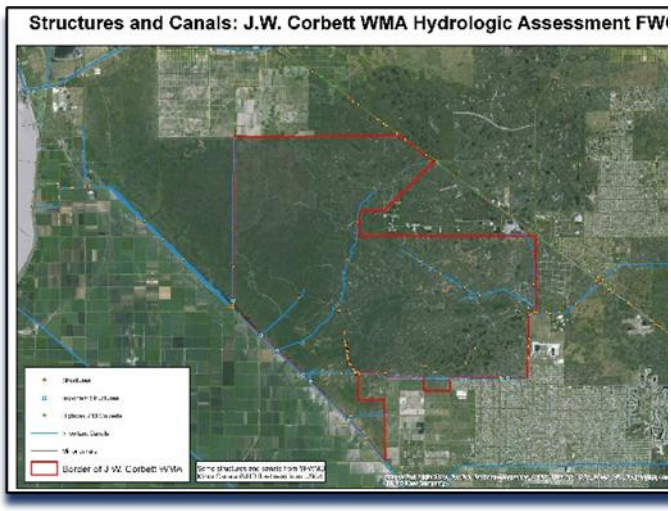
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)

Project Summary
Project Size: 60,348 acres
Cost: $600,000

SFEC identified basins/sub-basins, natural/historic flow-ways and seasonal direction of flow within the 60,348-acre (94 square mile) J.W. Corbett Wildlife Management Area (WMA) to determine appropriate water depths and draw down rates in order to mimic historic habitat conditions. The project involved public outreach, data collection, surveys, wetland system assessment, hydrology and hydraulic model development and calibration, development of performance measures and restoration strategies/management options, evaluation of the management options, and a final report and monitoring plan.

Data collection included installing 17 monitoring sites, 4 remote telemetry sites, 5 instrumented stage gauges, 6 staff gauges, 3 groundwater wells and 1 instrumented rain gauge. Surveying included 121 canal cross sections along 30 miles of canals and invert elevations of over 30 culverts and 5 water control structures. Our wetland assessment identified 7 major landscape sampling units with the WMA. We took field measurements along 21 transects to determine ground elevations, water depths, peat accumulation and elevations of biological indicators. We assessed the site using the Wetland Rapid Assessment Procedure scoring method. We used the field data to develop hydroperiod-based performance measures for sloughs, depression marshes and flatwoods. We also developed a flatwoods metric to protect Red Cockaded Woodpecker habitat.

Restoration Strategies/Management Options included plugging and filling canals, removing culverts, and restoring the Hungryland Slough. The S2DMM coupled surface and groundwater model was calibrated using historical and project-collected data. The model assisted in evaluating restoration strategies and management options and identifying our recommended plan. The final report documented our research and synthesis and recommended a plan toward hydrologic monitoring and restoration.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
a.	South Florida Engineering and Consulting LLC	Lake Worth Beach, FL	Prime Consultant

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

21. TITLE AND LOCATION (City and State)	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (if applicable)
Dinner Island Ranch Wildlife Management Area (WMA) Hydrologic Assessment, Hendry County, FL	2018	Ongoing

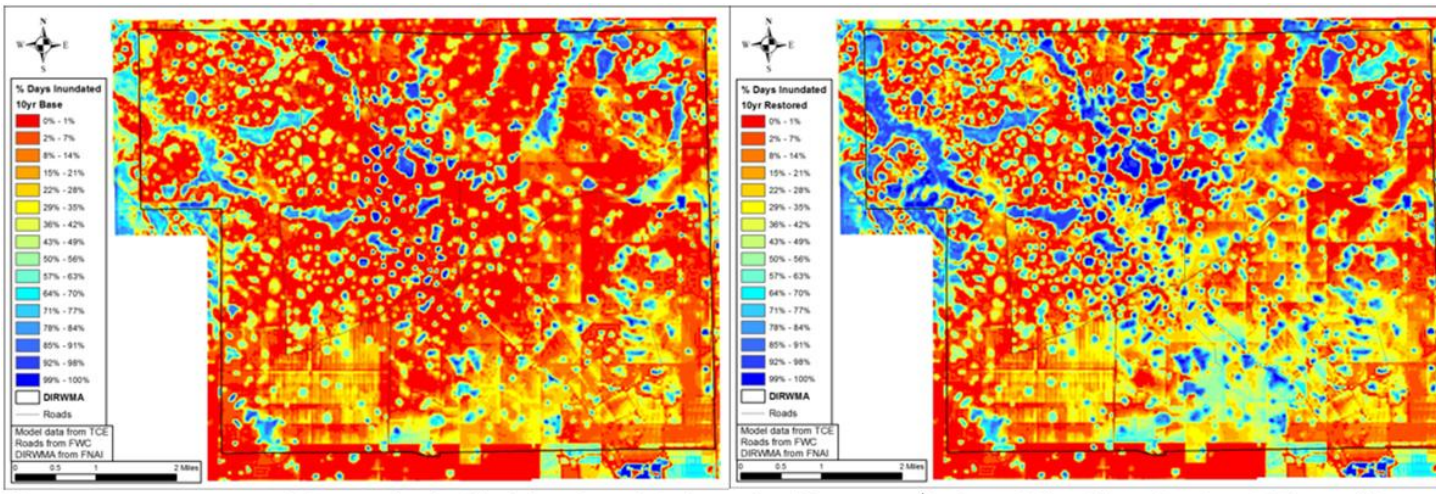
23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Florida Fish and Wildlife Conservation Commission (FWC)	Beth Morford	(561) 722-2188 Beth.Morford@myfwc.com

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

Project Summary
Project Size: 21,714 acres
Fee: $334,000

SFEC was tasked with conducting a hydrologic assessment of the Dinner Island Ranch Wildlife Management Area (DIRWMA), planning hydrologic restoration, and permitting the restoration plan. This involved collecting public data to study the area and its history. SFEC then installed a network of water gauges, while also conducting vegetation-elevation transects around the WMA to help us understand the conditions and hydrologic indicators. Much of the data we collected was fed into the S2DMM combined surface and groundwater model to model the existing conditions. After understanding the historic and current hydrology, SFEC developed a plan of filling ditches, removing berms, and installing culverts to facilitate a return to something closer to natural hydrology. The restoration plan was fed into the model to project the results to see if it accomplished objectives and to inform the crest elevation requirement for berms around some edges to prevent inundating neighboring private lands. As most of the land had been converted to pasture, we wanted to know if the seed bank could support a return to native wetland vegetation upon rehydration. To answer this, SFEC hired a grad student at FIU to conduct a study on soil samples SFEC collected along elevation gradients extending from remnant drained wetlands. The study concluded that native wetland species did have seeds present and able to grow in the requisite areas. SFEC successfully permitted the conceptual phased restoration plan, and was further asked to help design a fix for an AGI for an operating citrus grove on the property, which was not built according to the permitted plans. We permitted that as an expansion of the area to reduce peak stages such that the result would be closer to the natural hydrology. The project also included multiple public meetings to solicit stakeholder comments.



These maps compare model scenarios by % of days inundated over the 10-year run, in the existing (L) and restored (R) condition.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
a.	South Florida Engineering and Consulting LLC	Lake Worth Beach, FL	Prime Consultant

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT *(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)*	20. EXAMPLE PROJECT KEY NUMBER	
	4	
21. TITLE AND LOCATION (City and State)	**22. YEAR COMPLETED**	
	PROFESSIONAL SERVICES	CONSTRUCTION (if applicable)
Loxahatchee River Watershed Restoration Project – Flowway 3, Martin County, FL	Ongoing	N/A

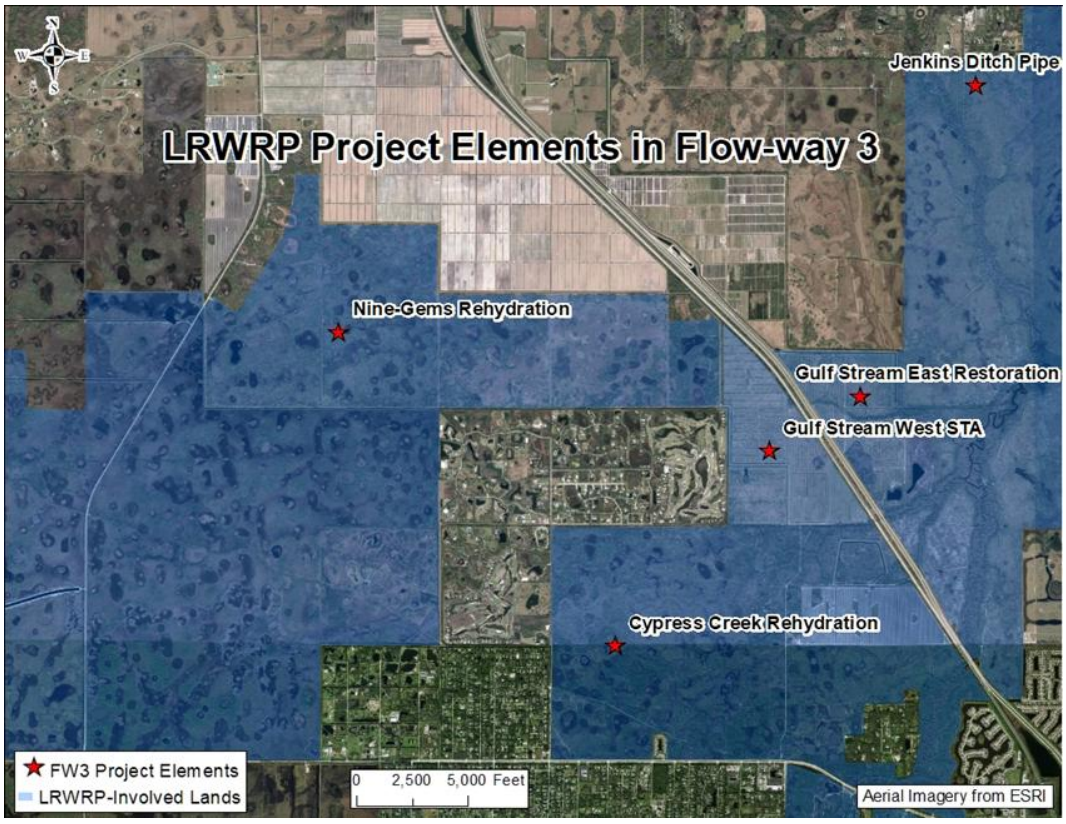
23. PROJECT OWNER'S INFORMATION		
a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
South Florida Water Management District (SFWMD)	Alan Shirkey	(561) 682-2579 ashirkey@sfwmd.gov

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

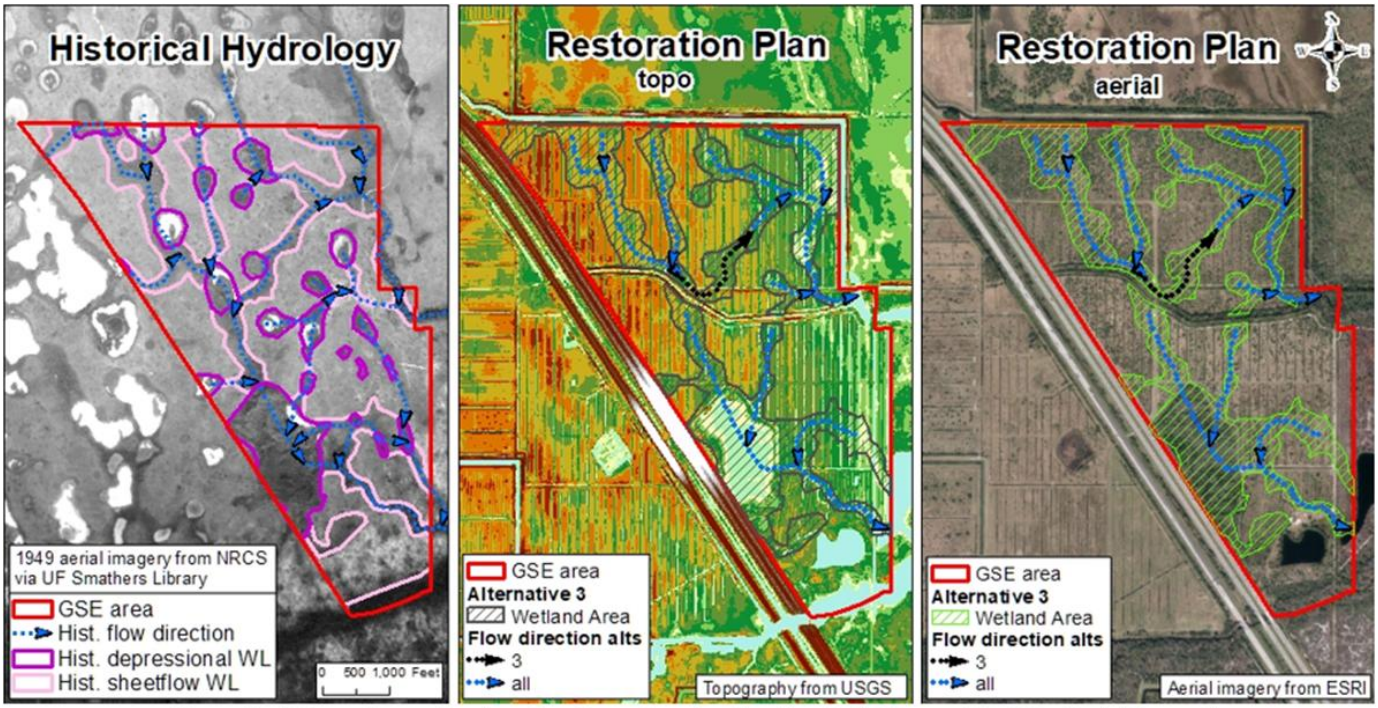
Project Summary
Contract Number: 4600004000
Cost: $3,855,474
SFEC: $721,158

SFEC's major responsibilities comprise seven site-specific detailed hydraulic model developments in different locations within the Flow-Way 3 area. In addition, SFEC performs ecological performance measures. Moreover, SFEC participates in coordination meetings with Prime and regional modeling team, collaborates with the design development team, provides consultation on regional model development and alternatives for project optimization, field visit, data collection, and ecological assessment.

SFEC reviewed and studied the methodology used in the Project Implementation Report (PIR). SFEC modeling team performs the hydraulic modeling task, which involves analysis of the existing and proposed hydraulic structures and will be applied to determine the channel hydraulics and backwater effects in support of structure design. SFEC formulated the methodology for the evaluation of the modeling work plan for detailed models that described the model objectives, modeling platform to be used, data to be used for model development, scenarios to be evaluated, through the modeling and related analysis. SFEC reviewed available historical information and performed a detailed site reconnaissance to gain an understanding of the existing site conditions.



The hydraulic modeling tasks include the development of seven different hydraulic models and analysis of the existing and proposed hydraulic structures to determine the channel hydraulics, flooding, and backwater effects in support of structure design within the Flow-Way 3 using these models. HEC-RAS is being used as the mathematical modeling tool to develop 1D/2D hydraulic models for the selected project areas. The boundary conditions for simulation are obtained from existing data and from the output of the regional models, which are developed with S2DMM modeling tool. The final alternatives from the regional model would be evaluated with detailed hydraulic model Impact on flooding (10 yr, 25 yr, 100 yr) mainly on the surrounding residential zone during different flood events would be analyzed.



Maps depicting elements of restoration planning for the Gulf Stream East Project Element

South Florida Engineering and Consulting LLC (SFEC) restoration sciences team performed ecological/habitat field reconnaissance at the seven project subregions included within the Loxahatchee River Watershed Restoration Plan (LRWRP) Flow-Way 3. Field reconnaissance included observations of hydroperiod indicators, including detailed plant community structure, habitat type, elevation (using RTK), water levels and soil types, and conditions. The reporting included recommendations intended to improve restoration and ecological benefits. Electronic geographic information systems (GIS) files with mapping completed were provided separately.

Field reconnaissance conducted for each of the LRWRP areas provided additional onsite data to support the H&H modeling efforts currently underway. Field data was compared to remotely sensed data to improve confidence in input data, as well as projections associated with future conditions. Field data was also used to evaluate hydrologic targets and to make recommendations that improve the achievement of specific project goals and objectives (primarily improved hydroperiod/ inundation duration and sheetflow/connectivity). SFEC refined performance measures (quantitative model post-processing tools) so that they could be applied to the LRWRP project design modeling.

Exemplary Flatwoods at the Jenkins Ditch Pipe project element

Project Relevancy

- Inland Flood Risk Management
- Levees, dikes, canals, water control structures
- Pump stations
- Aquatic ecosystem restoration
- Numerical modeling of water
- Design of improvement of quantity/quality/timing/distribution
- Analysis of water flows, hydrology, hydraulics, structures, and quality

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT			
	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
a.	South Florida Engineering and Consulting LLC	Lake Worth Beach, FL	Sub Consultant

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

21. TITLE AND LOCATION (City and State)	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (if applicable)
FPLOS Assessment for Current and Future Conditions in C-111 Coastal, C-111 South, C-111 AG, and L-31NS Watersheds, South FL	2023	N/A

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
South Florida Water Management District (SFWMD)	Carol Ballard	(561) 602-6378 cballard@sfwmd.gov

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

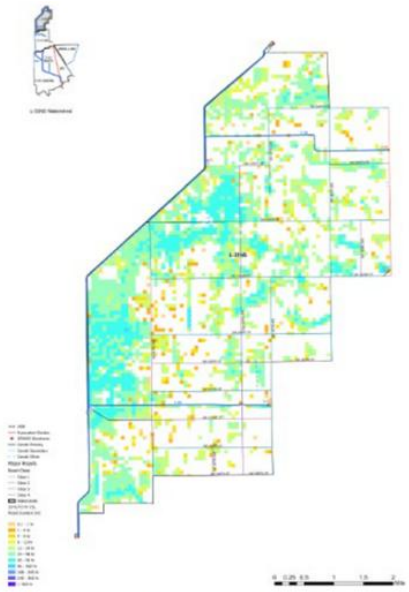


Figure 2. Watershed L-31NS Flood Duration Map for the 10-Year Design Storm Event for SLR 0

Project Summary
Cost: $596.270.91

The South Florida Water Management District (SFWMD) is conducting a system-wide review of the regional water management infrastructure to determine the flood protection level of service (FPLOS) being provided by existing infrastructure under current and future conditions. The future FPLOS describes the amount of flood protection provided by the water management facilities within a watershed considering future sea level rise, future development, and known water management issues in each watershed. This information can be used by local governments, the SFWMD, and other state and federal agencies to identify areas where improvements to the design, construction and operation or upgrade of water management facilities are required. The primary objectives are to develop and calibrate hydrologic and hydraulic models for the watersheds C111 South, C-111 Coastal, C-111 AG, Model-Land, and L-31NS, and to use those models in the evaluation of the FPLOS for existing and future conditions. Evaluations were assessed using six (6) performance metrics defined by SFWMD.

The major works that was undertaken are:

• Additional model development and conceptualization as needed for the AHED watersheds for the South Miami Dade County FPLOS MIKE SHE/Mike 1D model (SMD Model).

• Calibrated and validated H&H models of SFWMD's C-111 South, C-111 Coastal, C-111 AG, Model-Land, L-31NS, & US1 watersheds.

• Storm Surge and Tidal Boundary Conditions under Current (2019) and Future Sea Level Conditions: Hourly stage hydrographs at the tidal boundaries in the study area will be developed SFWMDstaff.

• Assessment of existing (2019) level of flood protection: This contract will produce an assessment of the FPLOS for existing infrastructure and land use in the studied watersheds.

• Assessment of three future sea level scenarios flood protection assuming no infrastructure changes or changes in land use.

• Recommendations for flood mitigation projects in the three C-111 watersheds, and the Model Land and L-31NS watersheds.

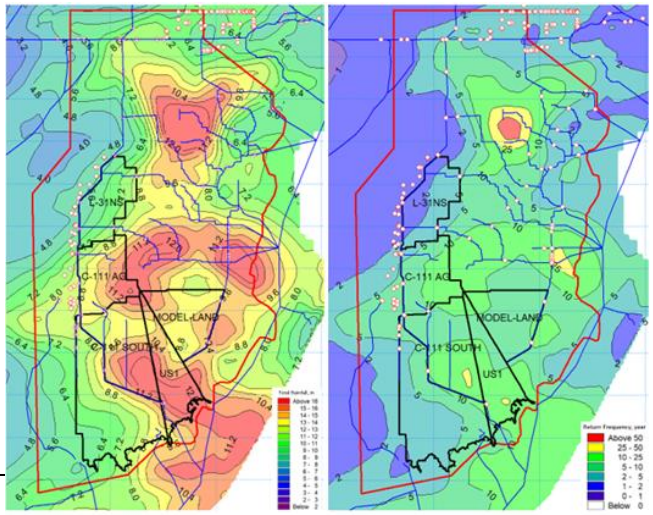


Figure 2-6 Total Maximum Rainfall, inches (Left), and Return Frequency, years (Right), for a 72-Hour Period of the December 2015 Storm Event

Project Relevancy

- Drainage and stormwater management systems
- Numerical modeling of water
- Analysis of water flows, hydrology, hydraulics, structures, and quality

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
a.	South Florida Engineering and Consulting LLC	Lake Worth Beach, FL	Prime Consultant

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

21. TITLE AND LOCATION (City and State)	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (if applicable)
Ancient Oaks Stormwater Treatment Area, St. Lucie County, FL	2025	2025

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
St. Lucie County, FL	Gary Franklin	(772) 267-6328 FranklinG@stlucieco.org

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

Project Summary
Cost: $155,771.88

The objective of this project was to improve water quality for the County's Basin Management Action Plan (BMAP) and include a grant-funded storm water retrofit. SFEC began by evaluating the existing project site conditions, including hydrology, drainage, and past and present surface water features of the project area (hydrologic and hydraulic study). SFEC then developed a survey plan of the project area including topographical surveys, roadway surveys, and completed survey drawings of the project area, and carried out environmental assessments of project area including locating wetlands, protected species surveys, vegetation survey, state historical preservation surveys, and a complete environmental assessment report.

Working with subconsultants, SFEC carried out geotechnical subsurface soil exploration including project background and understanding of future land use, laboratory testing program, and a complete engineering analysis and report. SFEC also modeled, developed, and designed drainage options including water control structures (stormwater pond) as well as other improvements that benefit both water quality, natural storage, and drainage. SFEC provided modeling reports describing expected nutrient removal, and hydrological function for incorporation into the County's BMAP. SFEC also coordinated with local stakeholders and regulatory agencies, will soon have acquired all necessary local, State, and Federal permits, and will soon have prepared construction documents to streamline competitive bidding process within grant time frames.

Project Relevancy

- Surface and groundwater modeling
- Assessments of natural systems/environmental monitoring and water supply planning
- Engineering Assessments and other related services
- Environmental data collections and assessments
- Environmental compliance and permitting
- Surveying and mapping

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
a.	South Florida Engineering and Consulting LLC	Lake Worth Beach, FL	Prime Consultant

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

21. TITLE AND LOCATION (City and State)	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (if applicable)
Indrio Savannahs Wet Pond Project, St. Lucie County, FL	2025	2025

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
St. Lucie County, FL	Gary Franklin	(772) 462-1192 FranklinG@stlucieco.org

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

Project Summary
Project Size: 297 acres
Cost: $275,227.27

Indrio Savannahs Preserve is a 297-acre natural area purchased for conservation. The site preserves much of the remaining north region of the Savannahs freshwater marsh system, which historically stretched from Ft. Pierce to Vero Beach, along the west side the coastal ridge. The preserve contains many important natural communities, as well as ditching that drains communities to the west, and a 35-acre man-made lake, which was dug into the savannah marsh for mining sand. The lake (along with berms and a spoil area) bisects the savannah marsh within the preserve, disrupting flow, which currently drains through canals that bypass the lake as well as most of the southern part of the marsh within the preserve. Nutrient inputs from failed septic tanks at a trailer park north of the preserve present a water quality issue. The wetlands and ditches drain to more unpreserved savannah marsh south of Indrio Road, continuing eventually into the Indian River Lagoon. The project will incorporate the lake into a hybrid restoration project and detention area that will restore some filled marsh and reconnect the bisected marsh to improve hydrology and increase nutrient absorption.

The project involved an initial project meeting, public outreach, data collection and survey, wetland system assessment, hydrology and hydraulic model development and calibration, water quality modeling and alternatives, development of an alternative analysis and performance measures, all permitting needs for the project including SFWMD, DEP, FWC/FWS/USACE (and/or FDEP), development of restoration strategies/management options, evaluation of the management options, design drawings for the major design elements, bid support to St. Lucie County, and a monitoring plan to track improvements and changes.

Field work involved professional survey cross-sections of multiple ditch locations as well as over a dozen vegetation/elevation transects through wetlands and uplands. Three telemetry water level sensors (trolls) were installed, two along the savannah marsh flow way north and south of the preserve and one in the lake. All permits were obtained (SFWMD ERP and COE 404) and construction drawings completed. The project is now in bid-support which recently involved a tree survey.

Project Relevancy
- Numerical modeling of water
- Engineering/design improvement of water quality/timing/distribution
- Analysis of water flows, hydrology, hydraulics, structures, and quality
- Geotechnical analysis

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
a.	South Florida Engineering and Consulting LLC	Lake Worth Beach, FL	Prime Consultant

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

21. TITLE AND LOCATION (City and State)	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (if applicable)
Jensen Beach Hydrologic Restoration, Savannas Preserve State Park, FL	2021	2021

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Florida Department of Environmental Protection (FDEP)	Ashley Kennedy	(772) 340-7530 Ashley.Kennedy@dep.state.fl.us

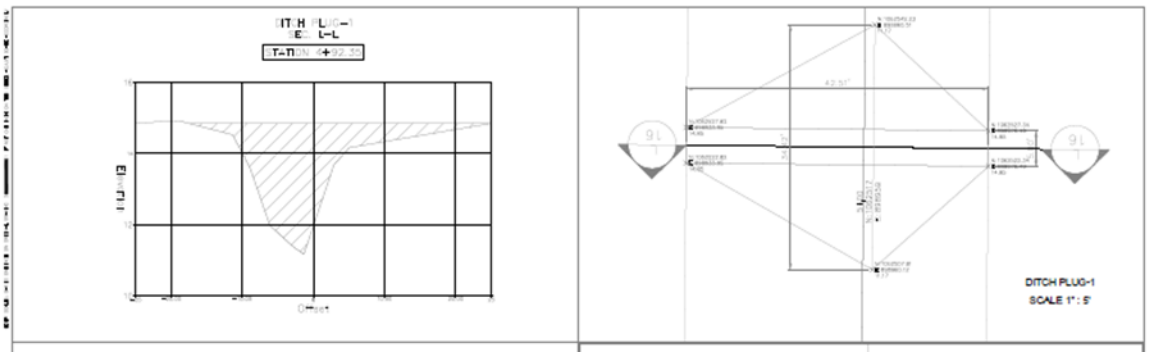
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)

The Jensen Beach Hydrologic Restoration Project was intended to restore sheet flow, hydroperiod, and wetland extent within the southern Savannas system, increase quality of wetland habitat, reduce invasive exotic plant infestations in wetlands and adjacent uplands due to disturbance caused by altered hydrology.

Project Summary
Project Size: over 6,000 acres
Cost: $33,400

This project specifically addressed two ditches to be filled, thereby enabling an overland flow between the wetlands for a longer period into the dry season. To accomplish this, our team evaluated historical ariel photography, recent LiDAR, and the existing vegetation. We identified 9 potential locations for plugs or partial fills in addition to the three requested low water crossings. We provided documentation to demonstrate that the restoration work proposed will not cause or contribute to increased flooding of adjacent lands, ICPR model runs were made for the 10-Year-24Hour, 25-Year-72Hour, and the 100-Year-72Hour storm events.

Of the nine total ditch plugs and partial fills designed, 5 were recommended to achieve our client's goals and reduce overall project cost; final design and technical specification documents were provided to FDEP. Our team successfully obtained an Environmental Resource Permit from the South Florida Water Management District.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
a.	South Florida Engineering and Consulting LLC	Lake Worth Beach, FL	Prime Conultant

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

21. TITLE AND LOCATION (City and State)	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (if applicable)
Professional Engineering Services for Restoration Projects, Palm Beach County, FL	2014-2020	N/A

23. PROJECT OWNER'S INFORMATION

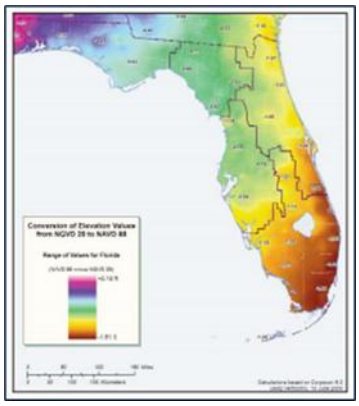
a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
South Florida Water Management District (SFWMD)	Mr. Gerard Flynn	561.682.2609 gflynn@sfwmd.gov

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

Project Summary
Contract Number: 46000003017
SFEC: $549,827

Under contract to the Prime Consultant, SFEC is providing services on a Work Order basis in the areas of: Civil Engineering, Environmental Engineering, Planning, Modeling, Hydrogeology, Mechanical Engineering, Environmental Science, Laboratory Analysis, Technical Writing and Editing and Electrical Engineering. Work Orders to date include:

Work Order No. 1: G-716 Divide Structure Final / RTA Design. Completed design calculations, plans, specifications, opinions of probable construction costs, construction schedule, operations plan, and the design for the required submittals were completed in accordance with Everglades Restoration and Capital Engineering Submittal Requirements.



Work Order No. 8: Determination of Future Rainfall Frequency Estimates for Planning Flood Protection Projects. Completed literature review of available methodologies and recommendation of the methodology most appropriate for the current Level of Service (LOS) program for the regional hydrologic system. Recommended a systematic approach for using climate model data including observed climate data, general circulation models, simulations, climate projections and conclusions regarding bringing global information to the regional scale. Addressed variables including precipitation, daily temperatures and seasonal extremes.

Work Order No. 9: Supplemental Regional Hydrologic Modeling Support for Western Everglades Restoration Project. Completed the update, application, post-processing and maintenance of regional hydrologic models to be used in support of the Western Everglades Restoration Project (WERP). Completed data QA/QC, pre- and post-processing tool development and refinement, and calibration and validation. Set-up, execution and evaluation of modeling scenarios (base and alternatives). Provided project assurances aspect, review and documentation of modeling results, presentation materials, and archive tools and associated data using version control software.

Work Order No. 17: Regional Hydrologic Modeling Support for the C-51 Reservoir Phase II Storage Study. SFEC was involved in the update, maintenance, application and post-processing of regional and related hydrologic models used to evaluate the C-51 Reservoir Phase II Project. In line with the scoping-execution-review-confirmation process of the entire project, under this Work Order SFEC will assist the District's H&H modelers in all phases of modeling. Objectives include: (1) Providing contractual services in the update, application, post-processing and maintenance of regional hydrologic models to be used in support of the project; (2) Conducting and assisting in data QA/QC, pre- and postprocessing tool development, refinement, calibration and validation; and (3) Assisting in the set-up, execution and evaluation of modeling scenarios (base and alternatives).

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
a.	South Florida Engineering and Consulting LLC	Lake Worth Beach FL	Sub

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT *(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)*	20. EXAMPLE PROJECT KEY NUMBER 10	
21. TITLE AND LOCATION (City and State)	22. YEAR COMPLETED	
Ecological and Environmental Scientific and Technology Support Services: Technical Support, Various Counties, FL	PROFESSIONAL SERVICES 2019-2024	CONSTRUCTION (if applicable) N/A

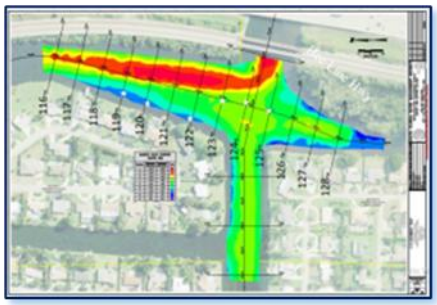
23. PROJECT OWNER'S INFORMATION		
a. PROJECT OWNER South Florida Water Management District (SFWMD)	b. POINT OF CONTACT NAME Tom James, Ph.D.	c. POINT OF CONTACT TELEPHONE NUMBER (561) 682-6356 tjames@sfwmd.gov

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

Project Summary
Contract Number: 4600004015
Cost: NTE $15,000,000

This was a three-year work order contract, that had been extended two of two optional years, to provide scientific support services in the disciplines of: (1) Water Quality, (2) Hydrology, Hydraulics and Hydrogeology, (3) Vegetation / Floristics, (4) Soils and Sediments, (5) Laboratory and Quality Assurance Support, (6) Data Mining, Data Integration, Data Analysis and Technical Reporting/Editing, and (7) Regulatory Permitting. SFEC's Work Orders to date include:

Work Order No.1: C-51 Canal Sediment Trap and Structure Flow Assessment Technical Support. Completed literature review of available reports, engineering plans, technical papers and memoranda concerning the C-51 sediment trap. Collected sediment samples of trap accumulations at six locations. Analyzed for semi-volatile parameters: OCCPs, PCBs, Total Nitrogen, Total Phosphorus, TOC and metals, including copper. Measured water depth and sediment thickness at the six sampling locations. Completed stream gauging and water sediment sampling for sediment load calculations to determine trap efficiency for six events under three flow discharge rates. Developed Project Final Technical report documenting all facets of work conducted under this work order.

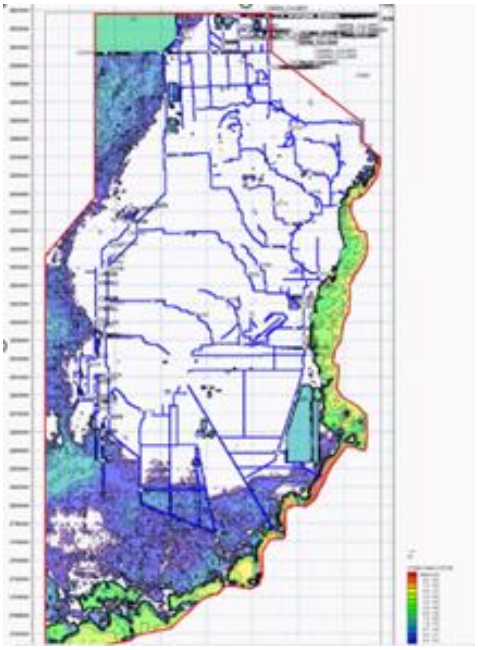


Work Order No. 2: Biological /Ecological Evaluations of the Lake Okeechobee Watershed Restoration Project C-38 ASR Clusters. Evaluated biological conditions, assessed protected species, documented wetlands and other jurisdictional waters, and prepared Uniform Mitigation Assessment assessments within the study area. Completed USACE Data Sheets for habitats within the study area. Deliverables will facilitate SFWMD efforts in the State and Federal Permitting Process.

Work Order No. 3: In-Depth Data Analysis and Integration of C-43 Water Quality Treatment and Testing Project – Phase I Bioassays and Mesocosms. Conducted an in-depth data analysis of the mesocosm study, including the denitrification and bioassay results, and constructed a mass balance nitrogen cycle model to understand how the created wetlands process, store and release nitrogen. The integrated results from this evaluation will be used to inform the study objectives of next phase of the C43-Water Quality Treatment and Testing Project research demonstration, Phase II test cells.

Work Order No. 4: Technical Support for Hydrology & Hydraulics Bureau Flood Protection Level of Support Program. Completed literature review of available reports, engineering plans, technical papers and memoranda concerning the C-51 sediment trap. Collected sediment samples of trap accumulations at six locations. Analyzed for semi-volatile parameters: OCCPs, PCBs, Total Nitrogen, Total Phosphorus, TOC and metals, including copper. Measured water depth and sediment thickness at the six sampling locations. Completed stream gauging and water sediment sampling for sediment load calculations to determine trap efficiency for six events under three flow discharge rates. Developed Project Final Technical report documenting all facets of work conducted under this work order.

Work Order No. 5: Technical Support for Hydrology & Hydraulics Bureau Identification of Geographic Boundaries in the Big Cypress Basin. SFEC provided multi-discipline expert services to complete different types of technical support services to include: 1. technical review of Big Cypress Basin (BCB) watershed delineation work products 2. make recommendations as to how best conduct data collection, quality assurance/quality control, synthesis and validation of work products 3. participate in effective communication of work objectives and products to both internal (to the District) and external stakeholders.



Work Order No. 6: Flood Protection Level of Service Assessment for Current and Future Conditions in C-111 Coastal, C-111 South, C-111 Ag, Model Land, and L-31NS Watersheds. SFEC developed a calibrated hydrologic and hydraulic model for the following District watersheds: C111 South, C-111 Coastal, C-111 AG, Model-Land, and L-31NS, and applied that model to evaluate the Flood Protection Level of Service (FPLOS) for existing and future conditions. Evaluations were conducted using the six (6) performance metrics defined by the District.

Work Order No. 7: Field Sampling and Laboratory Support for the Restoration Strategies Science Plan Studies. SFEC provided technical staff as needed to support field sampling, primarily consisting of surface water quality monitoring and quality assurance activities as well as collection of soil/sediment, vegetation, and other biological samples, along with the lab processing of these samples in preparation for analysis.

Work Order No. 8: Water Quality Sampling and Quality Assurance Support. SFEC is providing three full-time Scientists to: 1. support the WQM QA Team as assigned with the implementation of the field data validation process utilizing the WQM Field data validation Standard Operating Procedure (SOP). 2. Support collection of groundwater, atmospheric deposition (rain), fish, soil/sediment, vegetation, and other biological samples that may be requested in addition to routine surface water quality collection activities.

Work Order No. 9: Sustainable Landscape and Treatment in a Stormwater Treatment Area Study. The objective of this study is to provide guidance on hydraulic regimes that are consistent with in-situ
landscape vegetation, to provide optimal P treatment and reduce vegetation loss. SFEC has coordinated the design and installation of the project flume as well as submitted a completed work plan. The goal of this study is to achieve sustainability while maintaining controllability in treatment wetlands through flow discharges, water depth, water slope, and vegetation resistance.

Work Order No. 10: Spatial Soil Sampling in the C-44 and Lakeside Ranch Phase II Stormwater Treatment Areas and the Ten Mile Creek Water Preserve Area. SFEC collected and analyzed sediment samples from the C-44 STA, LRSTA Phase II, and the TMC Polishing Cell STA. The objective of this project was to determine baseline physical and chemical characteristics in three northern Stormwater Treatment Areas. SFEC collected soil samples, processed samples in the laboratory, and then analyzed samples for bulk density, soil moisture and organic content. SFEC also coordinated with the CAChE Nutrient Analysis Core Facility at Florida International University to develop extraction and analysis protocols based on SFWMD guidance. SFEC delivered subsamples to the CAChe Facility within required hold times for analysis. Deliverables included documentation of field collection and laboratory processing methods, site photos and all laboratory results including related QA/QC documentation.

Work Order No. 11: Water Quality Bureau Support for FY22 New Works Projects. SFEC provided technical support for part-time offsite scientific staff to supplement SFWMD staff with the annual permit preparation, including data gathering, analysis, and permit application reporting tasks for two new works project locations: C-111 SC and A-1 FEB.

Work Order No. 12: Water Quality Bureau Support for FY23 New Works/Restoration Projects. To meet increased reporting requirements associated with New Works projects in FY23, the SFWMD Water Quality Bureau requires scientific support services for data analysis and preparation of annual permit reports. Annual reports for permits issued to SFWMD by the Florida Department of Environmental Protection (FDEP) are published on March 1 of each year in Volume III of the South Florida Environmental Report (SFER). Previous SFERs are available on the SFWMD website: https://www.sfwmd.gov/science-data/scientific-publications-sfer. Under this Agreement, SFEC, is providing SFWMD with technical support for Lakeside Ranch Stormwater Treatment Area (LRSTA) and the C-111 Spreader Canal (C-111 SC).

Work Order No. 13: High Level Project Description and Cost Estimates of Recommended FPLOS Phase I Assessments for the C-111, C-111 South, C-111 Ag, Model Land and L-31ns Watersheds FPLOS Study. SFEC was contracted to provide a high-level project description and cost estimates for the above-mentioned FPLOS Phase I study. The Contractor should leverage the information included in the referenced studies to produce a high-level project description and cost estimates, and to allow the project recommendations to be incorporated into the SFWMD Sea Level Rise and Flood Resiliency Plan, in the format required by the plan (both in MS Word and MS Excel file templates, to be provided). The information might also be used as part of internal cost-benefit feasibility analysis being developed by SFWMD as part of grant applications to prioritize mitigation and adaptation alternatives for current and future conditions.

Project Relevancy

- Water Quality Monitoring
- Hydrology, hydraulics, hydrogeology
- Florida ecosystems and vegetation biology
- Soil sciences
- Analytical laboratory services
- Data science
- Report writing and technical editing
- Permitting

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT			
	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
a.	South Florida Engineering and Consulting LLC	Lake Worth Beach, FL	Prime

G. KEY PERSONNEL PARTICIPATION IN EXAMPLE PROJECTS

26. NAMES IF KEY PERSONNEL (From Section E, Block 12)	27. ROLE IN THIS CONTRACT (From Section E, Block 13)	28. EXAMPLE PROJECTS LISTED IN SECTION F (Fill in "Example Projects Key" section below before completing table. Place "X" under project key number for participation in same or similar role.)									
		1	2	3	4	5	6	7	8	9	10
Tom Conboy, P.E.	Program Manager	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
Andrew Gottlieb, Ph.D.	Principal Scientist	☒	☒	☒	☒	☐	☒	☒	☐	☐	☒
M. Zaki Moustafa, Ph.D.	WQ Modeler, QA/QC	☐	☐	☐	☐	☒	☐	☐	☐	☐	☐
Christopher McVoy, Ph.D.	Lead Soil Scientist	☐	☒	☒	☐	☐	☐	☐	☐	☐	☐
Mahmoud Madkour, Ph.D.	Lead Structural Eng.	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐
Georgio Tachiev, Ph.D.	Senior Modeler	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Daljit Sandhu, E.I. Ph.D.	Water. Resources Eng.	☐	☐	☐	☐	☒	☒	☐	☐	☒	☐
Tanzina Afrin, M.S.	Hydrologic Modeler	☐	☐	☐	☒	☒	☒	☐	☐	☐	☐
Michael Adler, M.S.	Senior Env. Sci./GIS	☒	☒	☒	☒	☐	☒	☒	☐	☐	☐
Ellen Ashford	Biologist	☒	☐	☐	☒	☐	☐	☐	☒	☐	☐
Jose Cruz	Assistant Project Mgr.	☐	☐	☐	☐	☐	☐	☐	☒	☐	☐
Thomas Prevratil	Sci. Technician II	☐	☐	☐	☐	☐	☐	☐	☐	☐	☒
K. Sue Byrd	Lead Technical Editor	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐

29. EXAMPLE PROJECTS KEY

NUMBER	TITLE OF EXAMPLE PROJECT (From Section F)	NUMBER	TITLE OF EXAMPLE PROJECT (From Section F)
1	East Lake Tohopekaliga EIS	6	Ancient Oaks STA
2	J.W. Corbett WMA Hydrologic Assessment	7	Indrio Savannahs Wet Pond Project
3	Dinner Island Ranch WMA Hyd. Assessment	8	Jensen Bch. Hydrologic Rest., Savannas Pr. S.P.
4	Loxahatchee River Watershed Restoration Pr.	9	Professional Engineering Services - SFWMD
5	FPLOS C-111 Assessment	10	Ecology, Science, and Technology - SFWMD

H. ADDITIONAL INFORMATION

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

SFEC WORK EXPERIENCE

- Engineering
  - Hydrology and Hydraulic Modeling
  - Water Quality Modeling
  - GIS
  - AutoCAD
  - Paving and Drainage Plans
  - Design of Restoration Projects
  - Stormwater Master Plans
  - Flood Studies/Watershed Studies
  - Climate and Rainfall modeling and analysis
  - CEI
- Permitting
  - Environmental Impact Statements/Environmental Assessments
  - Environmental Resource Permits
  - Water Use Permits
  - Dewatering Permits
- Environmental
  - Wetland Determinations/Delineation
  - Watershed Studies
  - Habitat Restoration
  - Water Quality Monitoring and Evaluation
  - Stormwater Treatment
  - Ecohydrology
  - Habitat Assessments/Evaluation of Ecosystem Structure and Function
  - Impact Assessment and Minimization
  - Experimental Design
  - Landscape Ecology
  - T & E Species Evaluations
  - Floristic Surveys
  - Periphyton/Algal Taxonomy
  - Performance Measure Development and Application
  - Scientific Peer Review
  - Staff Augmentation

SFEC OVERVIEW

SFEC Overview

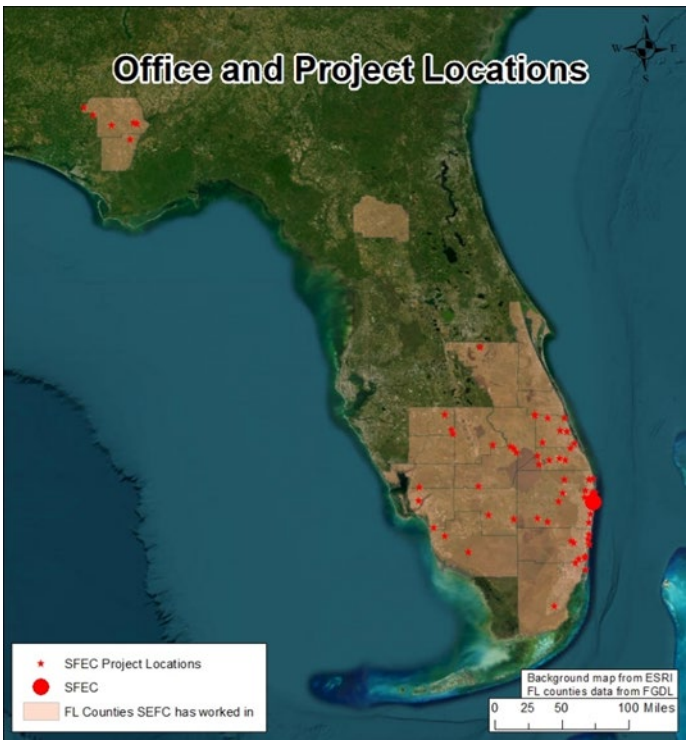
- Hydrology and Hydraulic Modeling
- Water Quality Modeling
- GIS / AutoCAD
- Paving and Drainage Plans
- Stormwater Master Plans
- Flood Studies / Watershed Studies

South Florida Engineering and Consulting LLC (SFEC) is an engineering and sciences firm that specializes in environmental engineering, water resources engineering, hydraulic and hydrologic modeling, water quality monitoring, environmental assessment, protected species assessments, natural areas management, environmental restoration, and environmental permitting. SFEC is a Limited Liability Corporation (LLC), solely owned and led by principal engineer Mr. Thomas Conboy, P.E. The firm is federally certified as a HUB Zone company and a certified small business enterprise with the South Florida Water Management District (SFWMD) and Florida Department of Transportation (FDOT).

The SFEC team includes a combination of 22 full-time and part-time environmental and civil engineers, H & H modelers, water resource and water quality experts, planners, biologists, soil, and environmental scientists. The team members have over 20 years of experience working together developing cost-effective and implementable strategies.

SFEC has successfully supported a variety of civil and environmental engineering projects, multiple environmental assessments, habitat restoration, and water quality improvement projects for local, state, and federal agencies. These projects include hydrologic and environmental assessments of large landscapes, design, construction support for stormwater treatment facilities, and a variety of environmental permitting projects.

We take a collaborative approach to all our projects, working closely with our clients to ensure that their goals and objectives are met.



Overall, the SFEC team is unique in the level of integration and collaboration between our engineering and science working groups. With a team of highly qualified professionals, we have provided a wide range of services to support sustainable management of water resources.

Our qualifications include a strong understanding of the regulatory environment and compliance requirements, as well as the technical expertise to develop innovative solutions to complex water resource challenges. We have a proven track record of delivering successful projects that meet or exceed our clients' expectations.

Our background includes a deep commitment to sustainability and environmental stewardship. We are dedicated to using our expertise to protect and conserve Florida's precious water resources for future generations.

Our team consists of seasoned professionals with a wide range of skills and expertise, including hydrology, water quality monitoring, environmental modeling, GIS mapping, and project management.

SFEC'S HYDROLOGICAL MODELING TEAM

Our team has extensive experience in modeling both surface and groundwater in Florida. We understand that this is an approach where a team of scientists working together is better than a few engineers working independently. Ultimately the input data needs to be adequate to calibrate the model in the first place. If there is not sufficient data, our team can propose cost effective ways to design, monitor, and collect needed data. Most modeling is performed with a project in mind. Performance metrics are developed, the model is calibrated and then decisions are made. We integrate the Biologists and Engineers to develop performance metrics that make sense. Once reliable performance metrics are established our team is excellent at developing graphics and tables that are simple and straight forward enough that decision makers can feel comfortable making decisions from our work. SFEC's extremely experienced team of Hydrological Modelers have extensive experience working on large scale water resource projects with Water Management Districts in the State of Florida.

SFEC has completed several modeling projects for SFWMD as part of the Ecology and Environmental Scientific and Technology Support Services Contract and Professional Engineering Services. This includes developing, calibrating, and validating hydrologic and hydraulic models for the District's C-111 South, C-111Coastal, C-111AG, Model-Land, L-31NS, and US1 watersheds to assess FPLOS for current and future sea level conditions (EEST WO6). SFEC also provided staff augmentation as part of H&H Bureau technical support services, including support on modeling work products produced in support of various FPLOS projects, feasibility study, project design and operation as well as peer review of new and modified models, editing and reviewing technical documents, review and recommend modeling strategies, model tool selection for project planning, design and operation (EEST WO4/WO5). SFEC also provided event modeling and H&H assessment services as a subcontractor on the STA 5-6 Connection to Lake Okeechobee project as part of the Professional Engineering Services Contract (WO4).

ENVIRONMENTAL PERMITTING

Several SFEC team members have extensive experience with environmental permitting.

Andrew Gottlieb, Ph.D. is a nationally recognized professional scientist who has managed, designed, and implemented coastal and wetland habitat and water quality studies throughout Florida.

He has wide ranging experience with agency technical coordination and state and federal permitting (ERP, 404, NEPA/Section 7). Prior to joining SFEC, Dr. Gottlieb provided NEPA support for a variety of SFWMD, USACE and FDOT projects.

Dr. Christopher McVoy is a noted eco-hydrologist, Everglades expert, author, and empiricist trained in systems analysis and simulation modeling. He is experienced in remote sensing, historical and modeling research, and the ecosystems and hydrology of South Florida. His work has been published in Ecological Economics, Agriculture, Ecosystems and Environment, and other peer-reviewed journals. He maintains a geomorphology program in Water Conservation Area 3-A.

Recently SFEC was contracted to support the federal Environmental Impact Statement (EIS) process as part of the East Lake Tohopekaliga (ELT) Drawdown and Habitat Enhancement. SFEC supported all aspects of this project including data collection, habitat assessment, review of potential mitigation requirements, public outreach, and report synthesis through the Record of Decision. SFEC supported the FWC and USACE in development of the Draft and Final EIS reports. SFEC also developed the Endangered Species Biological Assessment in support of the U.S. Fish and Wildlife Service's Biological Opinion for the proposed project. The Draft EIS was prepared in accordance with National Environmental Policy Act (NEPA), Council on Environmental Quality (CEQ).

Regulations (40 Code of Federal Regulation [CFR] 1500 et seq.), and USACE provisions for implementing procedural requirements of NEPA (33 CFR 230, USACE Engineering Regulation [ER] 200-2-2).

SFEC has also been contracted by SFWMD to provide technical support for the annual permit preparation, including data gathering, analysis, and permit application reporting tasks for two project locations: C-111 SC and A-1 FEB (2022) and again this year for C-111 SC and Lakeside Ranch STA (2023).

SFEC's Permitting Experience

- Environmental Impact Statements/Environmental Assessments
- Environmental Resource Permits
- Water Use Permits
- Dewatering Permits

CONSTRUCTION ENGINEERING

SFEC's experience with Construction Engineering Inspections Services includes City of Bonita Springs' Woodchip Bioreactor Pilot Project and SFWMD's BCB Electrification Package 2 Construction project construction management Services.

The Woodchip Bioreactor Pilot Project was to reduce nitrate concentrations within the Imperial River Watershed using woodchips as the carbon source for anaerobic bacteria. In addition to initial evaluation and assessment, SFEC designed and permitted the bioreactor, a parking lot to accommodate subsurface treatment facilities, and surface grading and drainage to be constructed on a plot of city-owned land in conjunction with the $16 million Downtown Renovation Project. SFEC's design accommodated preservation of native trees and accounted for streetscape improvements and beautification.

ENVIRONMENTAL SCIENCES

SFEC had a three-year work order contract, that has been extended two of two optional years, to provide scientific support services in the disciplines of water quality, hydrology, hydraulics, hydrogeology, vegetation, floristics, soils and sediments, laboratory and quality assurance support, data mining, data integration, data analysis, technical reporting/editing, and regulatory permitting for SFWMD's Ecology and Environmental Scientific and Technology Support Services Contract. This contract has been reissued for the next three (3) years with two one- year options.

SFEC's Environmental Sciences Experience

- Wetland Determinations/Delineation
- Water Quality Monitoring and Evaluation
- Stormwater Treatment
- Habitat Assessments/Evaluation of Ecosystem Structure and Function
- Impact Assessment and Minimization
- T&E Species Evaluations
- Floristic Surveys
- Periphyton/Algal Taxonomy
- Performance Measure Development and Application
- Scientific Peer Review
- Experimental Design

These work orders have included work on the C-51 Canal sediment trap and flow assessment, biological and ecological evaluations of the C-38 ASR Clusters as part of the Lake Okeechobee Watershed Restoration Project, provided in-depth data analysis and a nitrogen cycle model to support the C-43 Water Quality Treatment and Testing project, developed and calibrated hydrologic and hydraulic models for the District watersheds C111 South, C-111 Coastal, C-111AG, Model-Land, and L- 31NS, and applying those models to evaluate Flood Protection Level of Service (FPLOS) for existing and future conditions, staff augmentation for the Restoration Strategies Science Plan Studies and Water Quality Sampling and Quality Assurance, designed and implemented flume construction and operation as part of the Sustainable Landscape study, and collecting soil sediments from the C-44 STA, LRSTA, and the TMC Polishing Cell.

I. AUTHORIZED REPRESENTATIVE

The foregoing is a statement of facts.

31. SIGNATURE

Thomas V. Conboy

32. DATE

February 25, 2026

33. NAME AND TITLE

Thomas V. Conboy, P.E., President and Principal Engineer

ARCHITECT-ENGINEER QUALIFICATIONS

1. SOLICITATION NUMBER *(If any)*:

PART II - GENERAL QUALIFICATIONS

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

2a. FIRM (*or Branch Office*) NAME: South Florida Engineering and Consulting LLC	3. YEAR ESTABLISHED: 2011 / 4. UNIQUE ENTITY IDENTIFIER: UFZLENKLCLH4
2b. STREET: 30 South M Street	5. OWNERSHIP
2c. CITY: Lake Worth Beach / 2d. STATE: FL / 2e. ZIP CODE: 33460	a. TYPE: LLC
6a. POINT OF CONTACT NAME AND TITLE: Thomas V. Conboy, P.E., President/Principal Engineer	b. SMALL BUSINESS STATUS: 541330
6b. TELEPHONE NUMBER: (561) 412-6997 / 6c. EMAIL ADDRESS: tconboy@sfec.us	7. NAME OF FIRM *(If Block 2a is a Branch Office)*: N/A

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

9. EMPLOYEES BY DISCIPLINE

a. Function Code	b. Discipline	c. Number of Employees (1) FIRM	c. Number of Employees (2) BRANCH
07	Biologist	2	
08	CADD Technician	1	
12	Civil Engineer	2	
15	Construction Inspector	1	
16	Construction Manager		
19	Ecologist	1	
23	Environmental Engineer	1	
24	Environmental Scientist	5	
32	Hydraulic Engineer		
34	Hydrologist	2	
48	Project Manager	1	
58	Technician/Analyst	3	
62	Water Resource Engineer	1	
	Technical Editor	1	
	Other Employees	21	
	Total		

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

a. Profile Code	b. Experience	c. Revenue Index Number *(see below)*
E09	Environmental Impact Studies	1
E10	Environmental Mapping	1
E11	Environmental Planning	1
E13	Environmental Testing and Analysi	1
G04	GIS Services	1
E01	Ecological and Archeological Inves	1
I06	Irrigation; Drainage	1
R11	Rivers; Canals; Waterways	1
S13	Storm Water Handling & Facilities	1
W02	Water Resources; Hydrology; GW	1
C15	Construction Management	1

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

(Insert revenue index number shown at right)

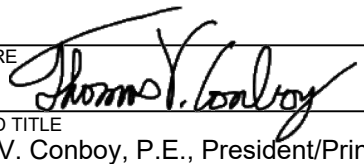
a. Federal Work	1
b. Non-Federal Work	5
c. Total Work	5

PROFESSIONAL SERVICES REVENUE INDEX NUMBER

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

12. AUTHORIZED REPRESENTATIVE

The foregoing is a statement of facts.

a. SIGNATURE: 

b. DATE: February 25, 2026

c. NAME AND TITLE: Thomas V. Conboy, P.E., President/Principal Engineer

Florida dbpr Department of Business & Professional Regulation

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- AB&T Delinquent Invoice & Activity List Search

LICENSEE DETAILS

4:34:37 AM 2/8/2026

Licensee Information

Name:	SOUTH FLORIDA ENGINEERING AND CONSULTING, LLC (Primary Name)
Main Address:	30 SOUTH M STREET LAKE WORTH Florida 33460
County:	PALM BEACH

License Information

License Type:	Engineering Business Registry
Rank:	Registry
License Number:	29874
Status:	Current
Licensure Date:	04/17/2012
Expires:	

Special Qualifications	Qualification Effective

Alternate Names

View Related License Information

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LICENSEE DETAILS

5:20:06 PM 9/16/2025

Licensee Information

Name:	CONBOY, THOMAS V. (Primary Name)
Main Address:	1513 LEE CT LAKE WORTH BEACH Florida 33461
County:	PALM BEACH

License Information

License Type:	Professional Engineer
Rank:	Prof Engineer
License Number:	59289
Status:	Current,Active
Licensure Date:	01/14/2003
Expires:	02/28/2027

Society of Wetland Scientists
Professional Certification Program, Inc

grants the designation

Professional Wetland Scientist

For

Andrew D. Gottlieb, Ph.D.

In recognition of all the professional requirements approved by the Society of Wetland Scientists Certification Program, Inc. and verified by the Society's Certification Review Panel on 4/11/2021.
Professional Wetland Scientist number 3354. Due to recertify by 4/11/2026.

Kimberli J. Ponzio, PWS
President

Robert D. Shannon, Ph.D., PWS
Review Panel Chair

SOUTH FLORIDA WATER MANAGEMENT DISTRICT
PROTECTION OF THE EVERGLADES SINCE 1949
US Army Corps of Engineers ®
Certificate of Completion
THIS CERTIFICATE IS AWARDED TO:
Christopher McVoy
FOR SUCCESSFULLY COMPLETING THE SFAEP WETLAND DELINEATION TRAINING
South Florida Association of Environmental Professionals
Danielle C. Sattelberger
11/8/19
DANIELLE SATTELBERGER, PROGRAM COORDINATOR
DATE OF COMPLETION

Ron DeSantis, Governor

Melanie S. Griffin, Secretary

FBPE
FLORIDA BOARD OF PROFESSIONAL ENGINEERS

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

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

MADKOUR, MAHMOUD S

4717 DIXIE DRIVE
PONCE INLET FL 32127

LICENSE NUMBER: PE48966

EXPIRATION DATE: FEBRUARY 28, 2027

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CSI®
Building Knowledge
Improving Project Delivery

CERTIFIED CONSTRUCTION CONTRACT ADMINISTRATOR

This is to certify that

Mahmoud Madkour, CCCA

Has successfully completed the Certified Construction Contract Administrator examination, demonstrating the required knowledge and ability to administer a contract for construction as prescribed by the Certification Committee of CSI.

Issued: Spring 2020
Renewal due: June 2023

Ellen Kay Crews, FCSI, CCS, CCCA
CSI Chair, Board of Directors

Sandi Velleca, FCSI, CCS, CCCA
Chair, CSI Certification Committee | 2018

Ron DeSantis, Governor

Melanie S. Griffin, Secretary

FBPE
FLORIDA BOARD OF PROFESSIONAL ENGINEERS

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

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

TACHIEV, GEORGIO IVANOV

465 BRICKELL AVENUE
APT 3906
MIAMI FL 33131

LICENSE NUMBER: PE67520

EXPIRATION DATE: FEBRUARY 28, 2027

Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.

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

SER SOCIETY FOR ECOLOGICAL RESTORATION

SOUTH FLORIDA WATER MANAGEMENT DISTRICT
US Army Corps of Engineers ®
Certificate of Completion
THIS CERTIFICATE IS AWARDED TO:
Michael Adler
FOR SUCCESSFULLY COMPLETING THE SFAEP WETLAND DELINEATION TRAINING
South Florida Association of Environmental Professionals
Danielle C. Sattelberger
DANIELLE SATTELBERGER, PROGRAM COORDINATOR
11/8/19
DATE OF COMPLETION

LICENSEE DETAILS

5:28:45 PM 9/16/2025

Licensee Information

Name:	SANDHU, DALJIT (Primary Name)
Main Address:	219 B FOXTAIL DRIVE UNIT B WEST PALM BEACH Florida 33415
County:	PALM BEACH

License Information

License Type:	Engineering Intern
Rank:	Eng Intern
License Number:	1100019228
Status:	Current
Licensure Date:	06/11/2015
Expires:	

Project Management Institute

THIS IS TO CERTIFY THAT

Ellen Ashford

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

Project Management Professional (PMP)®

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

Ike Nwankwo, PMP | Chair, Board of Directors

PROJECT MANAGEMENT INSTITUTE CORPORATE SEAL 19 69 PENNSYLVANIA

Pierre Le Manh | President & CEO

Certification Number: 4071424

Original Grant Date: 28 March 2025

Citizenship: United States

Expiration Date: 28 March 2028

Certificate of Completion

Certifies that

Ellen Ashford

has successfully completed the

South Florida Water Management District

AIRBOAT OPERATOR CERTIFICATION COURSE

Matt Bowers 10/2/23

Instructor/ Date

The South Florida Water Management District

Presents this Certificate for completing the
UNESCO-IHE Modeling Lecture Series to

TANZINA AFRIN
Bangladesh

May 28 – May 31, 2013
West Palm Beach, Florida

sfwmd.gov

Jayantha Obeysekera, Ph.D., P.E., D.WRE
Chief Modeler – Hydrologic & Environmental Systems Modeling

Scanned with CamScanner

BoatU.S. Foundation
for Boating Safety & Clean Water

This Certificate is Awarded to

NASBLA

Thomas S Prevratil

In acknowledgement of successful completion of the BoatU.S. Foundation's Online Boating Safety Course on:

November 13, 2019

This course is an interactive, non-proctored exam provided at no cost on the Internet by the BoatU.S. Foundation for Boating Safety and Clean Water, 147 Old Solomon's Island Rd. Suite 513, Annapolis, MD 21401 (703)461-2878 www.BoatUS.org

The Online Boating Safety Course is approved by the National Association of Boating Law Administrators (NASBLA) and recognized by the US Coast Guard.

This certificate is valid for 90 days from the date of issue. Your permanent Florida Boater Education ID Card will be sent from the Florida Fish and Wildlife Conservation Commision within 4 weeks.

State Test: Florida

By signing this certificate, I certify that I successfully completed the BoatU.S. Foundation's Online Boating Safety Course on my own and without the assistance of others. (Failure to sign this certificate invalidates its authenticity.)

Signature: Thomas S Prevratil

NASBLA approved in: Florida
Certificate Number: FMCEB78JH5LILE7
Date of Birth: 1963-03-04 Sex: m
Hair Color: Gray Eye Color: Brown

Thomas S Prevratil
9273 Neptune's Basin Court
Boca Raton FL
33434

Award Date: November 13, 2019

NASBLA
BoatU.S. Foundation
for Boating Safety & Clean Water

USA MARINE Training

Certifies that

THOMAS SMITH PREVRATIL

D.O.B. 03/04/1963

6581 ATHENA DR LAKE WORTH, FLORIDA 33463

Has successfully completed the USAMT/ D.O.I./ FWC Approved

AIRBOAT OPERATOR CERTIFICATION COURSE

Class Dates: NOVEMBER 13TH– NOVEMBER 14TH, 2019

Testing Date: NOVEMBER 13TH, 2019

Date of Issue: NOVEMBER 14TH, 2019

U.S. DEPARTMENT OF THE INTERIOR MARCH 3, 1849

Classroom/Practical Instructor:

Test Score 98%

Emergency Management Institute

FEMA

This Certificate of Achievement is to acknowledge that

THOMAS S PREVRATIL

has reaffirmed a dedication to serve in times of crisis through continued professional development and completion of the independent study course:

IS-00100.c
Introduction to Incident Command System, ICS-100

Issued this 26th Day of May, 2022

0.2 IACET CEU

Jeffrey D. Stern, Ph.D.
Superintendent
Emergency Management Institute
Federal Emergency Management Agency

Emergency Management Institute

FEMA

This Certificate of Achievement is to acknowledge that

THOMAS S PREVRATIL

has reaffirmed a dedication to serve in times of crisis through continued professional development and completion of the independent study course:

IS-00200.c
Basic Incident Command System for Initial Response
ICS-200

Issued this 20th Day of June, 2022

0.4 IACET CEU

Jeffrey D. Stern, Ph.D.
Superintendent
Emergency Management Institute
Federal Emergency Management Agency

Emergency Management Institute

FEMA

This Certificate of Achievement is to acknowledge that

THOMAS S PREVRATIL

has reaffirmed a dedication to serve in times of crisis through continued professional development and completion of the independent study course:

IS-00700.b
An Introduction to the National Incident Management System

Issued this 23rd Day of June, 2022

0.4 IACET CEU

Jeffrey D. Stern, Ph.D.
Superintendent
Emergency Management Institute
Federal Emergency Management Agency

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

14D

The Groves of St. Lucie County Community Development District

Request for Qualifications – District Engineering Services

Competitive Selection Criteria

		Ability and Adequacy of Professional Personnel	Consultant's Past Performance	Geographic Location	Willingness to Meet Time and Budget Requirements	Certified Minority Business Enterprise	Recent, Current and Projected Workloads	Volume of Work Previously Awarded to Consultant by District	TOTAL SCORE
	weight factor	**25**	**25**	**20**	**15**	**5**	**5**	**5**	**100**
	NAME OF RESPONDENT								
1	**Kimley-Horn and Associates, Inc.**								
2	**South Florida Engineering and Consulting, LLC**								

_____ _____

Board Member's Signature Date

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

15

RESOLUTION 2026-10

A RESOLUTION BY THE BOARD OF SUPERVISORS OF THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT DESIGNATING THE LOCATION OF THE LOCAL DISTRICT RECORDS OFFICE AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, The Groves of St. Lucie County Community Development District ("District") is a local unit of special-purpose government created and existing pursuant to Chapter 190, *Florida Statutes*, being situated within St. Lucie County, Florida; and

WHEREAS, the District is statutorily required to designate a local district records office location for the purposes of affording citizens the ability to access the District's records, promoting the disclosure of matters undertaken by the District, and ensuring that the public is informed of the activities of the District in accordance with Chapter 119 and Section 190.006(7), *Florida Statutes*.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT:

SECTION 1. The District's local records office shall be located at:

LOCATION: _____

_____

_____

SECTION 2. This Resolution shall take effect immediately upon adoption.

PASSED AND ADOPTED this 30th day of March, 2026.

ATTEST:

THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT

_____
Secretary/Assistant Secretary

_____
Chair/Vice Chair, Board of Supervisors

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

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INTERIM ENGINEERING SERVICES AGREEMENT

THIS AGREEMENT ("Agreement") is made and entered into this 3 day of March, 2026, by and between:

The Groves of St. Lucie Community Development District, a local unit of special-purpose government established pursuant to Chapter 190, *Florida Statutes*, and located in St. Lucie County, Florida, with a mailing address of 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431 ("**District**"); and

Kimley-Horn and Associates, Inc., a North Carolina corporation, with a mailing address of 445 24th St, Suite 200, Vero Beach, FL 32960 ("**Engineer**" and, together with the District, the "**Parties**").

RECITALS

WHEREAS, the District is a local unit of special-purpose government established pursuant to the Uniform Community Development District Act of 1980, as codified in Chapter 190*, Florida Statutes* ("**Uniform Act**"); and

WHEREAS, the District is authorized to plan, finance, construct, install, acquire and/or maintain improvements, facilities and services in conjunction with the development of the lands within the District; and

WHEREAS, the District intends to employ Engineer on an interim basis to perform engineering planning and/or study activities, as defined by separate work authorization(s); and

WHEREAS, the Engineer shall serve as District's professional representative in each service or project to which this Agreement applies and will give consultation and advice to the District during performance of the services.

NOW, THEREFORE, for and in consideration of the mutual covenants herein contained, the acts and deeds to be performed by the parties and the payments by the District to the Engineer of the sums of money herein specified, it is mutually covenanted and agreed as follows:

1. SCOPE OF SERVICES. The Engineer will provide general engineering planning and/or study services, as authorized by one or more Work Authorization(s) as defined herein, including:

a. Preparation of any necessary reports and attendance at meetings of the District's Board of Supervisors.
b. Assistance in meeting with necessary parties involving bond issues, special reports, feasibility studies, or other tasks.

Other items requested by the Board of Supervisors; provided however that any such items shall be subject to the terms of a Work Authorization to be agreed to by the parties.

2. REPRESENTATIONS. The Engineer hereby represents to the District that:

a. It has the experience and skill to perform the services required to be performed by this Agreement.
b. It shall design to and comply with applicable federal, state, and local laws, and codes, including without limitation, professional registration and licensing

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requirements (both corporate and individual for all required basic disciplines) in effect during the term of this Agreement, and shall, if requested by District, provide certification of compliance with all registration and licensing requirements.

c. It shall perform said services in accordance with generally accepted professional standards and will use that degree of care and skill ordinarily exercised, under similar circumstances, by reputable members of its profession in the same locality at the time the services are provided ("Standard of Care")
d. It is adequately financed to meet any financial obligations it may be required to incur under this Agreement.

3. METHOD OF AUTHORIZATION. Each service or project shall be authorized in writing by the District. The written authorization shall be incorporated in a work authorization which shall include the scope of work, compensation, .mutually agreed to project schedule, and special provisions or conditions specific to the service or project bring authorized ("**Work Authorization**"). Authorization of services or projects under this Agreement shall be at the sole option of the District. The Work Authorization #1 attached hereto as **EXHIBIT C** is hereby authorized.

4 . COMPENSATION. It is understood and agreed that the payment of compensation for services under this Agreement shall be stipulated in each Work Authorization. Services rendered by Engineer under this contract shall not exceed the lesser of Thirty-Five Thousand Dollars or the amounts specifically authorized by written Work Authorization. The Engineer shall submit invoices for services provided and fees earned on a monthly basis. Such invoices shall be supported by a progress report showing the actual tasks performed and their relation to the percentage of fee claimed. Monthly invoices shall be paid by the District in accordance with Section 218.74, Florida Statutes. Resolution of improper payment requests or disputes between the District and the Engineer will be resolved in accordance with Section 287.76, Florida Statutes. One of the following methods will be utilized:

a. *Lump Sum Amount* - The District and Engineer shall mutually agree to a lump sum amount for the services to be rendered payable monthly in direct proportion to the work accomplished.

b. *Hourly Personnel Rates* - For services or projects where scope of services is not clearly defined, or for recurring services or other projects where the District desires to use hourly compensation rates, the District and Engineer shall use the hourly compensation rates outlined in **EXHIBIT A** attached hereto. The District and Engineer may agree to a "not to exceed" amount when utilizing hourly personnel rates for a specific Work Authorization.

5. REIMBURSABLE EXPENSES. Reimbursable expenses consist of actual expenditures made by Engineer, its employees, or its consultants in the interest of the project for the incidental expenses as listed as follows:

a. Expenses of transportation and living when traveling in connection with a project, for long distance phone calls and telegrams, and fees paid for securing approval of authorities having jurisdiction over the project. All expenditures shall be made in accordance with Chapter 112, *Florida Statutes*, and with the District's travel policy.
b. Expense of reproduction, postage and handling of drawings and specifications.

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6. TERM OF CONTRACT. It is understood and agreed that this Agreement is for professional engineering services. It is further understood and agreed that the term of this Agreement will be from the time of execution of this Agreement until terminated pursuant the terms herein.

7. SPECIAL SERVICES. When authorized in writing by the District, additional special consulting services may be utilized by Engineer and paid for on a cost basis.

8. BOOKS AND RECORDS. Engineer shall maintain comprehensive books and records relating to any services performed under this Agreement, which shall be retained by Engineer for a period of at least four (4) years from and after completion of any services hereunder, or such other period as required by law. The District, or its authorized representative, shall have the right to audit such books and records at all reasonable times upon prior notice to Engineer.

9. OWNERSHIP OF DOCUMENTS.

a. All rights in and title to all plans, drawings, specifications, ideas, concepts, designs, sketches, models, programs, reports, or other tangible work product originally developed by Engineer pursuant to this Agreement ("**Work Product**") shall be and remain the sole and exclusive property of the District upon Engineer's receipt of payment for services performed, and shall be considered work for hire.

b. The Engineer shall deliver all Work Product to the District upon completion thereof, and receipt of payment for services performed, unless it is necessary for Engineer in the District's sole discretion, to retain possession for a longer period of time. Upon early termination of Engineer's services hereunder, Engineer shall deliver all such Work Product whether complete or not. The District shall have all rights to use any and all Work Product. Engineer shall retain copies of the Work Product for its permanent records, provided the Work Product is not used without the District's prior express written consent. Engineer agrees not to recreate any Work Product contemplated by this Agreement, or portions thereof, which if constructed or otherwise materialized, would be reasonably identifiable with the project. Notwithstanding the foregoing, Engineer shall retain its rights in its standard drawing details, designs, specifications, databases, computer software and any other proprietary property.

c. If said work product is used by the District for any purpose other than that purpose which is intended by this Agreement, the District shall indemnify Engineer from any and all claims and liabilities which may result from such re-use.

d. The District exclusively retains all manufacturing rights to all materials or designs developed under this Agreement. To the extent the services performed under this Agreement produce or include copyrightable or patentable materials or designs, such materials or designs are work made for hire for the District as the author, creator, or inventor thereof upon creation, and the District shall have all rights therein including, without limitation, the right of reproduction, with respect to such work. Engineer hereby assigns to the District any and all rights Engineer may have including, without limitation, the copyright, with respect to such work. The Engineer acknowledges that the District is the motivating factor for, and for the purpose of copyright or patent, has the right to direct and supervise the preparation of such copyrightable or

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patentable materials or designs.

10. ACCOUNTING RECORDS. Records of Engineer pertaining to the services provided hereunder shall be kept on a basis of generally accepted accounting principles and shall be available to the District or its authorized representative for observation or audit at mutually agreeable times.

11. REUSE OF DOCUMENTS. All documents including drawings and specifications furnished by Engineer pursuant to this Agreement are instruments of service. They are not intended or represented to be suitable for reuse by District or others on extensions of the work for which they were provided or on any other project. Any reuse without specific written consent by Engineer will be at the District's sole risk and without liability or legal exposure to Engineer. All documents including drawings, plans and specifications furnished by Engineer to District are subject to reuse in accordance with Section 287.055(10), *Florida Statutes*.

12. COST ESTIMATES. Since Engineer has no control over the cost of labor, materials or equipment or over a contractor's methods of determining prices, or over competitive bidding or market conditions, his opinions of probable cost provided as a service hereunder are to be made on the basis of his experience and qualifications and represent his best judgment as a design professional familiar with the construction industry, but Engineer cannot and does not guarantee that proposals, bids, or the construction costs will not vary from opinions of probable cost prepared by him. If the District wishes greater assurance as to the construction costs, it shall employ an independent cost estimator at its own expense. Services to modify approved documents to bring the construction cost within any limitation established by the District will be considered additional services and justify additional fees.

13. INSURANCE. Engineer shall, at its own expense, maintain insurance during the performance of its services under this Agreement, with limits of liability not less than the amounts set forth in **EXHIBIT B.** If any such policy of insurance is a "claims made" policy, and not an "occurrence" policy, the Engineer shall, without interruption, maintain the insurance for at least five (5) years after the termination of this Agreement.

The District, its officers, supervisors, agents, staff, and representatives shall be named as additional insured parties on all of the insurance policies listed in **EXHIBIT B** except with respect to the Worker's Compensation Insurance and the Professional Liability for Errors and Omissions Insurance. The Engineer shall furnish the District with the Certificate of Insurance and any applicable endorsements evidencing compliance with the requirements of this Section. No certificate shall be acceptable to the District unless it provides that any change or termination within the policy periods of the insurance coverage, as certified, shall not be effective without written notice to the District per the terms of the applicable policy. Insurance coverage shall be from a reputable insurance carrier, licensed to conduct business in the state of Florida.

If the Engineer fails to have secured and maintained the required insurance, the District has the right (without any obligation to do so, however), to secure such required insurance in which event, the Engineer shall pay the cost for that required insurance and shall furnish, upon demand, all information that may be required in connection with the District's obtaining the required insurance.

14. CONTINGENT FEE. The Engineer warrants that it has not employed or retained any company or person, other than a bona fide employee working solely for the Engineer, to solicit or secure

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this Agreement and that it has not paid or agreed to pay any person, company, corporation, individual, or firm, other than a bona fide employee working solely for the Engineer, any fee, commission, percentage, gift, or other consideration contingent upon or resulting from the award or making of this Agreement.

15. AUDIT. The Engineer agrees that the District or any of its duly authorized representatives shall, until the expiration of three (3) years after expenditure of funds under this Agreement, have access to and the right to examine any books, documents, papers, and records of the Engineer involving transactions related to the Agreement. The Engineer agrees that payment made under the Agreement shall be subject to reduction for amounts charged thereto that are found on the basis of audit examination not to constitute allowable costs. All required records shall be maintained until an audit is completed and all questions arising therefrom are resolved, or three (3) years after completion of all work under the Agreement.

16. INDEMNIFICATION. Engineer agrees to indemnify, and hold the District and the District's officers and employees harmless from liabilities, damages, losses, and costs, including, but not limited to, reasonable attorney's fees, which may come against the District and the District's officers and employees, to the extent caused by negligent, reckless, or intentionally wrongful acts, omissions, or defaults by Engineer or persons employed or utilized by Engineer in its services provided under this Agreement. To the extent a limitation on liability is required by Section 725.06 of the *Florida Statutes* or other applicable law, liability under this section shall in no event exceed (i) One Million Dollars ($1,000,000) per occurrence or (ii) Two Million Dollars ($2,000,000) aggregate. Engineer agrees such limitation bears a reasonable commercial relationship to the contract and was part of the project specifications or bid documents.

17. INDIVIDUAL LIABILITY. UNDER THIS AGREEMENT, AND SUBJECT TO THE REQUIREMENTS OF SECTION 558.0035, *FLORIDA STATUTES*, WHICH REQUIREMENTS ARE EXPRESSLY INCORPORATED HEREIN, AN INDIVIDUAL EMPLOYEE OR AGENT MAY NOT BE HELD INDIVIDUALLY LIABLE FOR NEGLIGENCE.

18. SOVEREIGN IMMUNITY. The Engineer agrees and covenants that nothing in this Agreement shall constitute or be construed as a waiver of District's limitations on liability pursuant to Section 768.28, *Florida Statutes*, or any other statute or law.

19. PUBLIC RECORDS. The Engineer agrees and understands that Chapter 119, *Florida Statutes*, may be applicable to documents prepared in connection with work provided to the District and agrees to cooperate with public record requests made thereunder. In connection with this Agreement, Engineer agrees to comply with all provisions of Florida's public records laws, including but not limited to Section 119.0701, *Florida Statutes*, the terms of which are incorporated herein. Among other requirements, Engineer must:

a. Keep and maintain public records required by the District to perform the service.
b. Upon request from the District's custodian of public records, provide the District with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119, *Florida Statutes* or as otherwise provided by law.
c. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the

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contract term and following completion of the Agreement if the Engineer does not transfer the records to the District.

d. Upon completion of this Agreement, transfer, at no cost, to the District all public records in possession of the Engineer or keep and maintain public records required by the District to perform the service. If the Engineer transfers all public records to the District upon completion of this Agreement, the Engineer shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Engineer keeps and maintains public records upon completion of the Agreement, the Engineer shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the District, upon request from the District's custodian of public records, in a format that is compatible with the information technology systems of the District.

IF THE ENGINEER HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE ENGINEER'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONTACT THE PUBLIC RECORDS CUSTODIAN AT C/O WRATHELL. HUNT AND ASSOCIATES, LLC, 2300 GLADES ROAD, SUITE 410W, BOCA RATON, FLORIDA 33431, PHONE (561) 571-0010, AND E-MAIL CERBONEC@WHHASSOCIATES.COM.

20. EMPLOYMENT VERIFICATION. The Engineer agrees that it shall bear the responsibility for verifying the employment status, under the Immigration Reform and Control Act of 1986, of all persons it employs in the performance of this Agreement.

21. CONFLICTS OF INTEREST. The Engineer shall abide by all applicable ethical canons and professional standards relating to conflicts of interest.

22. SUBCONTRACTORS. The Engineer may subcontract portions of the services, subject to the terms of this Agreement and subject to the prior written consent of the District, which may be withheld for any or no reason. Without in any way limiting any terms and conditions set forth in this Agreement, all subcontractors of Engineer shall be deemed to have made all of the representations and warranties of Engineer set forth herein and shall be subject to any and all obligations of Engineer hereunder. Prior to any subcontractor providing any services, Engineer shall obtain from each subcontractor its written consent to and acknowledgment of the terms of this Agreement. Engineer shall be responsible for all acts or omissions of any subcontractors.

23. INDEPENDENT CONTRACTOR. The District and the Engineer agree and acknowledge that the Engineer shall serve as an independent contractor of the District. Neither the Engineer nor employees of the Engineer, if any, are employees of the District under the meaning or application of any federal or state unemployment, insurance laws, or any other potentially applicable laws. The Engineer agrees to assume all liabilities or obligations by any one or more of such laws with respect to employees of the Engineer, if any, in the performance of this Agreement. The Engineer shall not have any authority to assume or create any obligation, express or implied, on behalf of the District and the Engineer shall have no authority to represent as agent, employee, or in any other capacity the District unless set forth

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differently herein or authorized by vote of the Board.

24. ASSIGNMENT. Neither the District nor the Engineer shall assign, sublet, or transfer any rights under or interest in this Agreement without the express written consent of the other. Nothing in this paragraph shall prevent the Engineer from employing such independent professional associates and consultants as Engineer deems appropriate, pursuant to the terms of this Agreement.

25. THIRD PARTIES. Nothing in the Agreement shall inure to the benefit of any third party for the purpose of allowing any claim which would otherwise be barred by operation of law.

26. CONTROLLING LAW; VENUE. The Engineer and the District agree that this Agreement shall be controlled and governed by the laws of the State of Florida. Venue for any action brought relating to this Agreement shall be in St. Lucie County, Florida.

27. TERMINATION. The District may terminate this Agreement for cause immediately upon notice to Engineer. The District or the Engineer may terminate this Agreement without cause upon thirty (30) days written notice. At such time as the Engineer receives notification of the intent of the District to terminate the contract, the Engineer shall not perform any further services unless directed to do so in writing by the District. In the event of any termination or breach of any kind, the Engineer shall not be entitled to consequential damages of any kind (including but not limited to lost profits), but instead the Engineer's sole remedy will be to recover payment for services rendered to the date of the notice of termination, subject to any offsets.

28. RECOVERY OF COSTS AND FEES. In the event either party is required to enforce this Agreement by court proceedings or otherwise, then the prevailing party shall be entitled to recover from the other party all costs incurred, including reasonable attorneys' fees, at all judicial levels.

29. AMENDMENTS. Amendments to and waivers of the provisions contained in this Agreement may be made only by an instrument in writing which is executed by both of the parties hereto and formally approved by the Board.

30. AGREEMENT. This Agreement reflects the negotiated agreement of the parties, each represented by competent legal counsel. Accordingly, this Agreement shall be construed as if both parties jointly prepared it, and no presumption against one party or the other shall govern the interpretation or construction of any of the provisions of this Agreement.

31. NOTICES. All notices, requests, consents and other communications hereunder ("**Notices**") shall be in writing and shall be delivered, mailed by First Class Mail, postage prepaid, or tele-copied to the parties, and at the addresses first set forth above. Except as otherwise provided in this Agreement, any Notice shall be deemed received only upon actual delivery at the address set forth above. Notices delivered after 5:00 p.m. (at the place of delivery) or on a non-business day, shall be deemed received on the next business day. If any time for giving Notice contained in this Agreement would otherwise expire on a non-business day, the Notice period shall be extended to the next succeeding business day. Saturdays, Sundays, and legal holidays recognized by the United States government shall not be regarded as business days. Counsel for the District and counsel for the Engineer may deliver Notice on behalf of the District and the Engineer. Any party or other person to whom Notices are to be sent or copied may notify the other parties and addressees of any change in name or address to which Notices

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shall be sent by providing the same on five (5) day's written notice to the parties and addressees set forth herein.

32. RECOVERY OF COSTS AND FEES. In the event either party is required to enforce this Agreement by court proceedings or otherwise, then the prevailing party shall be entitled to recover from the other party all costs incurred, including reasonable attorneys' fees, paralegal fees and expert witness fees and costs.

33. E-VERIFY. The Engineer shall comply with and perform all applicable provisions of Section 448.095, *Florida Statutes*. Accordingly, to the extent required by Florida Statute, Engineer shall register with and use the United States Department of Homeland Security's E-Verify system to verify the work authorization status of all newly hired employees. The District may terminate this Agreement immediately for cause if there is a good faith belief that the Engineer has knowingly violated Section 448.091, *Florida Statutes*. By entering into this Agreement, the Engineer represents that no public employer has terminated a contract with the Engineer under Section 448.095(2)(c), *Florida Statutes*, within the year immediately preceding the date of this Agreement.

34. PURSUANT TO FS 558.0035, EMPLOYEES OF ENGINEER MAY NOT BE HELD INDIVIDUALLY LIABLE FOR DAMAGES RESULTING FROM NEGLIGENCE UNDER THIS AGREEMENT.

[THIS SPACE LEFT BLANK]

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IN WITNESS WHEREOF, the parties hereto have caused these present to be executed the day and year first above written.

THE GROVES OF ST. LUCIE COMMUNITY DEVELOPMENT DISTRICT

Signed by:
Michael Folstein
AFFB9AD3818C47D...

Chairperson, Board of Supervisors

KIMLEY-HORN AND ASSOCIATES, INC.

Brooke Arriaga

By: Brooke Arriaga
Its: Regional Contract Lead

EXHIBIT A: Rate Schedule

EXHIBIT B: Insurance Certificate

EXHIBIT C: Approved Work Authorization #1

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EXHIBIT A

RATE SCHEDULE

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Kimley»Horn

Kimley-Horn and Associates, Inc.

Hourly Labor Rate Schedule

Classification	*Rate*
Analyst	$180 - $270
Professional	$260 - $335
Senior Professional I	$310 - $425
Senior Professional II	$430 - $450
Senior Technical Support	$195 - $310
Support Staff	$145 - $175
Technical Support	$150 - $215

Effective through June 30, 2026

Subject to adjustment thereafter

Internal Reimbursable Expenses will be charged at 5% of Labor Billings

External Reimbursable Expenses will be charged at 15% mark-up, or per the Contract

Sub-Consultants will be billed per the Contract

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EXHIBIT B
INSURANCE CERTIFICATE & ENDORSEMENTS

Docusign Envelope ID: F2D6723F-3183-470E-A439-69AF8372D4B2

EXHIBIT C
APPROVED WORK AUTHORIZATION #1

Docusign Envelope ID: F2D6723F-3183-470E-A439-69AF8372D4B2

The Groves of St. Lucie Community Development District

Subject: **Work Authorization Number 1**

Dear Chairman, Board of Supervisors:

Kimley-Horn and Associates, Inc. ("**Engineer**") is pleased to submit this work authorization to provide interim engineering services for The Groves of St. Lucie Community Development District ("**District**"). We will provide these services pursuant to our current agreement dated _____ ("**Engineering Agreement**") as follows:

I. Scope of Work

The District will engage the services of Engineer on an interim basis to perform those services as necessary for the preparation of a District engineer's report in connection with the issuance of District Bonds, construction phase services, and attendance at meetings and bond validation proceedings regarding the District's issuance of bonds.

If the Engineer is requested to make site observations, for construction phase services, Engineer's visits will be for the purpose of providing the District with a general project status update, and determining in the Engineer's reasonable professional judgment whether, based on the Engineer's observations, the work is part of the District's improvement plan, the work was conducted in general conformance with the design specifications and applicable contract, the Engineer is not aware of defects, and whether it is appropriate for the District to accept and make payment for such work; provided, however, that, in making such determinations, the Engineer does not guarantee contractor's performance or assume responsibility for contractor's failure to perform in accordance with the applicable contract. It is further agreed that the Engineer shall not be responsible for certifying the quality of the work of other design professionals outside of Engineer's firm. The Engineer will not be required to perform construction project observation services on behalf of the District for projects it did not personally design. The Engineer shall have no responsibility for an contractor's means, methods, techniques, equipment choice and usage, sequence, schedule, safety programs, or safety practices, not shall Engineer have any authority or responsibility to stop or direct the work of any contractor, except that, depending on the applicable construction contract, the Engineer may have the role of reviewing change proposals, reviewing payments, and otherwise taking consistent with construction administration services provided for under industry standard AIA, EJCDC and other similar agreements.

II. Fees

The District will compensate Engineer pursuant to the hourly rate schedule contained in the Engineering Agreement. The District will reimburse Engineer all direct costs which include items such as printing, drawings, travel, deliveries, etc., pursuant to the Agreement.

This proposal, together with the Engineering Agreement, represents the entire understanding between the District and Engineer with regard to the referenced work authorization. If you wish to accept this work authorization, please sign both copies where indicated, and return one complete copy to our office. Upon receipt, we will promptly schedule our services.

Docusign Envelope ID: F2D6723F-3183-470E-A439-69AF8372D4B2

Thank you for your consideration.

APPROVED AND ACCEPTED

THE GROVES OF ST. LUCIE CDD

By: Signed by: Michael Folstein AFFB9AD3818C47D...
Authorized Representative

Sincerely,

KIMLEY-HORN AND ASSOCIATES, INC.

By: Brooke Arriaga

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

UNAUDITED FINANCIAL STATEMENTS

THE GROVES OF ST LUCIE COUNTY
COMMUNITY DEVELOPMENT DISTRICT
FINANCIAL STATEMENTS
UNAUDITED
FEBRUARY 28, 2026

THE GROVES OF ST LUCIE COUNTY
COMMUNITY DEVELOPMENT DISTRICT
BALANCE SHEET
GOVERNMENTAL FUNDS
FEBRUARY 28, 2026

	General Fund	Total Governmental Funds
ASSETS		
Cash	$ 3,709	$ 3,709
Due from Landowner	12,576	12,576
Total assets	16,285	16,285
LIABILITIES AND FUND BALANCES		
Liabilities:		
Accounts payable	$ 4,459	$ 4,459
Landowner advance	11,841	11,841
Total liabilities	16,300	16,300
DEFERRED INFLOWS OF RESOURCES		
Deferred receipts	12,576	12,576
Total deferred inflows of resources	12,576	12,576
Fund balances:		
Unassigned	(12,591)	(12,591)
Total fund balances	(12,591)	(12,591)
Total liabilities, deferred inflows of resources and fund balances	$ 16,285	$ 16,285

THE GROVES OF ST LUCIE COUNTY
COMMUNITY DEVELOPMENT DISTRICT
GENERAL FUND
STATEMENT OF REVENUES, EXPENDITURES,
AND CHANGES IN FUND BALANCES
FOR THE PERIOD ENDED FEBRUARY 28, 2026

	Current Month	Year to Date	Budget	% of Budget
REVENUES				
Landowner contribution	$ -	$ 3,677	$ 71,098	5%
Total revenues	-	3,677	71,098	5%
EXPENDITURES				
Professional & administrative				
Management/accounting/recording**	2,000	4,000	26,000	15%
Legal	769	1,284	25,000	5%
Engineering	-	-	2,000	0%
Dissemination agent*	-	-	333	0%
Telephone	17	83	200	42%
Postage	-	-	500	0%
Printing & binding	42	208	500	42%
Legal advertising	202	202	7,500	3%
Annual special district fee	-	175	175	100%
Insurance	-	5,000	5,500	91%
Contingencies/bank charges	10	586	1,500	39%
Website hosting & maintenance	-	1,680	1,680	100%
Website ADA compliance	-	145	210	69%
Total professional & administrative	3,040	13,363	71,098	19%
Excess/(deficiency) of revenues over/(under) expenditures	(3,040)	(9,686)	-	
Fund balances - beginning	(9,551)	(2,905)	-	
Fund balances - ending	$ (12,591)	$ (12,591)	$ -	

*These items will be realized when bonds are issued

**WHA will charge a reduced management fee of $500 per month during semi-dormancy then $2,000 per month when the District is active then $4,000 per month post bond issuance.

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

MINUTES

DRAFT

MINUTES OF MEETING
THE GROVES OF ST. LUCIE COUNTY COMMUNITY DEVELOPMENT DISTRICT

The Board of Supervisors of The Groves of St. Lucie County Community Development District held a Special Meeting on January 22, 2026 at 11:00 a.m., at the Fairfield Inn & Suites Ft. Pierce, 6502 Metal Dr., Ft. Pierce, Florida 34945.

Present:

Michael Folstein	Vice Chair
Derek Youngblood	Assistant Secretary

Also present:

Cindy Cerbone	District Manager
Chris Conti	Wrathell, Hunt and Associates (WHA)
Jere Earlywine (via telephone)	District Counsel
Alex Dougherty	Interim District Engineer
Juliet Misconi	Supervisor-Appointee

FIRST ORDER OF BUSINESS **Call to Order/Roll Call**

Ms. Cerbone called the meeting to order at 11:00 a.m.

Supervisors Folstein and Youngblood were present. Supervisor Pedretti was absent. Two Seats were vacant.

- **Acceptance of Resignation of Sonja Pedretti [Seat 2]**

This item, previously the Fourth Order of Business, was presented out of order.

Ms. Cerbone presented the resignation of Sonja Pedretti from Seat 2.

On MOTION by Mr. Youngblood and seconded by Mr. Folstein, with all in favor, the resignation of Sonja Pedretti from Seat 2, was accepted.

- **Consider Appointment of Juliet Misconi to Fill Unexpired Term of Seat 2; Term Expires November 2028**

This item, previously the Fifth Order of Business, was presented out of order.

Mr. Youngblood nominated Ms. Misconi to Seat 2. No other nominations were made.

On MOTION by Mr. Youngblood and seconded by Mr. Folstein, with all in favor, the appointment of Juliet Misconi to Seat 2, was approved.

- **Administration of Oath of Office to Appointed Supervisor Juliet Misconi**

Mr. Conti, a Notary of the State of Florida and duly authorized, administered the Oath of Office to Ms. Misconi and provided a new Supervisor packet. Ms. Misconi stated she has never served on a CDD Board but was a former Deputy City Manager and is familiar with the Sunshine Law, the ethics training requirement, conflicts of interest and Form 1 filings.

Ms. Cerbone stated Kutak Rock has recommended that Board Members who are Landowners or Development team members complete Form 8B, out of an abundance of caution. She read the verbiage, as follows:

"I am a member of the Board of Supervisors of The Groves of St. Lucie County Community Development District, created under Chapter 190, Florida Statutes. I am a principal, employee or business associate or relative of a Landowner or Developer in the District. Decisions potentially affecting the Landowner may come before the Board from time to time, pursuant to Sections 112.314.3b and 190.007 Florida Statutes. I understand that I do not have a conflict of interest when voting on such matters and I am not prohibited from voting on such matters. That said, I am filling out this disclosure of voting conflict out of an abundance of caution and following the procedures required by Statute 112.314.3 Florida Statutes and for the duration of my term and any subsequent terms."

Mr. Earlywine stated disclosing the affiliation with the Landowner for the record and having it on record will help protect the Board Members if there is an ethics challenge against them later. He urged Ms. Misconi to contact him with any questions or concerns.

SECOND ORDER OF BUSINESS **Public Comments**

No members of the public spoke.

THIRD ORDER OF BUSINESS **Consider Appointment to Fill Unexpired Term of Seat 1; Term Expires November 2028**

This item was deferred.

- **Administration of Oath of Office to Appointed Supervisor (the following will be provided under separate cover)**

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

B. Membership, Obligations and Responsibilities

C. Guide to Sunshine Amendment and Code of Ethics for Public Officers and Employees

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

FOURTH ORDER OF BUSINESS **Acceptance of Resignation of Sonja Pedretti [Seat 2]**

This item was presented during the First Order of Business.

FIFTH ORDER OF BUSINESS **Consider Appointment of Juliet Misconi to Fill Unexpired Term of Seat 2; Term Expires November 2028**

This item was presented during the First Order of Business.

SIXTH ORDER OF BUSINESS **Consideration of Resolution 2026-01, Electing and Removing Officers of the District and Providing for an Effective Date**

Ms. Cerbone presented Resolution 2026-01. The slate of officers is as follows:

Michael Folstein	Chair
Derek Youngblood	Vice Chair
Juliet Misconi	Assistant Secretary

No other nominations were made.

This Resolution removes the following from the Board:

Sonja Pedretti	Assistant Secretary

The following prior appointments by the Board remain unchanged by this Resolution:

Craig Wrathell	Secretary
Chris Conti	Assistant Secretary
Cindy Cerbone	Assistant Secretary
Craig Wrathell	Treasurer
Jeffrey Pinder	Assistant Treasurer

On MOTION by Mr. Folstein and seconded by Mr. Youngblood, with all in favor, Resolution 2026-01, Electing, as nominated, and Removing Officers of the District and Providing for an Effective Date, was adopted.

SEVENTH ORDER OF BUSINESS **Consideration of Resolution 2026-02, Designating a Date, Time, and Location of a Public Hearing Regarding the District's Intent to Use the Uniform Method for the Levy, Collection, and Enforcement of Non-Ad Valorem Special Assessments as Authorized by Section 197.3632, Florida Statutes; Authorizing the Publication of the Notice of Such Hearing; and Providing an Effective Date**

Ms. Cerbone presented Resolution 2026-02 and read the title.

Discussion ensued regarding the timing of the platting, permitting, grading, when work will commence and the bond timing.

On MOTION by Mr. Folstein and seconded by Mr. Youngblood, with all in favor, Resolution 2026-02, Designating March 30, 2026 at 11:00 a.m., at the Fairfield Inn & Suites Ft. Pierce, 6502 Metal Dr., Ft. Pierce, Florida 34945, as the Date, Time, and Location of a Public Hearing Regarding the District's Intent to Use the Uniform Method for the Levy, Collection, and Enforcement of Non-Ad Valorem Special Assessments as Authorized by Section 197.3632, Florida Statutes; Authorizing the Publication of the Notice of Such Hearing; and Providing an Effective Date, was adopted.

EIGHTH ORDER OF BUSINESS **Consideration of Master Engineer's Report**

Ms. Cerbone asked if the Board should consider the Fifteenth Order of Business, approving the Interim Engineer, before the Mr. Dougherty presents the Engineer's Report, or keep the current order. The Board was amenable to leaving it as the Fifteenth Order of Business.

Mr. Dougherty presented the Bond Validation Engineer's Report dated January 2026. He reviewed the pertinent information, including the project description, product types, the onsite improvements that will be funded by the CDD and the offsite utility improvements. The total number of units is 612 and the total Capital Improvement Plan (CIP) cost estimate is $70,500,000.

Mr. Earlywine stated the Board must make two findings when starting an assessment process; first, it must find that there is sufficient benefit from the project to justify the assessment levy and, second, that the assessments are fairly and reasonably allocated. Mr. Dougherty's report expressly states that there is benefit to the lands in the District from the

project and notes the amounts. It further states that the project is feasible and the cost estimates are reasonable, which is sufficient. Mr. Earlywine recommended approval of the Engineer's Report in substantial form.

On MOTION by Ms. Misconi and seconded by Mr. Folstein, with all in favor, the Master Engineer's Report, in substantial form, was approved.

NINTH ORDER OF BUSINESS **Consideration of Master Special Assessment Methodology Report**

Ms. Cerbone presented the Master Special Assessment Methodology Report dated January 22, 2026 and stated it corresponds with the information in the Engineer's Report. She reviewed the financing program; benefit allocation; true-up mechanism; and Appendix Tables. She noted the following:

- The total number of residential units is 612.
- The anticipated total CIP costs are estimated at $70,500.000.
- The total par amount of bonds, including the costs of financing, capitalized interest and debt service reserve, is $96,765,000.

Ms. Misconi asked if the breakdown reflects the modification from the change that will be made after site development. Mr. Dougherty stated a concerning issue arose with the stormwater lakes related to their geometry and the County wanting more upland areas further northwest that caused a few losses. The District Engineer had to expand these areas to regain that open space. Staff is working through this on the northeast and does not yet know the impact.

Ms. Cerbone noted that this might reduce the number of residential units and asked if the stormwater ponds will impact the first bond issue or the second one. Mr. Earlywine confirmed that there will be two bond issuances and stated today's reports do not have to be 100% accurate; they will be updated in a few months.

On MOTION by Mr. Folstein and seconded by Mr. Youngblood, with all in favor, the Master Special Assessment Methodology Report, in substantial form, was approved.

TENTH ORDER OF BUSINESS **Consideration of Resolution 2026-03, Declaring Special Assessments; Designating the Nature and Location of the Proposed**

Improvements; Declaring the Total Estimated Cost of the Improvements, the Portion to Be Paid by Assessments, and the Manner and Timing In Which the Assessments are to be Paid; Designating the Lands Upon Which The Assessments Shall Be Levied; Providing for an Assessment Plat and a Preliminary Assessment Roll; Addressing the Setting of Public Hearings; Providing for Publication of this Resolution; and Addressing Conflicts, Severability and an Effective Date

Ms. Cerbone presented Resolution 2026-03 and read the title.

On MOTION by Mr. Folstein and seconded by Mr. Youngblood, with all in favor, Resolution 2026-03, Declaring Special Assessments; Designating the Nature and Location of the Proposed Improvements; Declaring the Total Estimated Cost of the Improvements, the Portion to Be Paid by Assessments, and the Manner and Timing In Which the Assessments are to be Paid; Designating the Lands Upon Which The Assessments Shall Be Levied; Providing for an Assessment Plat and a Preliminary Assessment Roll; Addressing the Setting of Public Hearings for March 30, 2026 at 11:00 a.m., at the Fairfield Inn & Suites Ft. Pierce, 6502 Metal Dr., Ft. Pierce, Florida 34945; Providing for Publication of this Resolution; and Addressing Conflicts, Severability and an Effective Date, was adopted.

ELEVENTH ORDER OF BUSINESS **Consideration of Resolution 2026-04, Authorizing the Issuance of Not to Exceed $96,765,000 the Groves of St. Lucie County Community Development District Capital Improvement Revenue Bonds, in One or More Series; Approving the Form of a Master Trust Indenture; Appointing a Trustee, Registrar and Paying Agent; Approving a Capital Improvement Program; Authorizing the Commencement of Validation Proceedings Relating To the Bonds; and Providing an Effective Date**

Mr. Earlywine presented Resolution 2026-04, known as the Bond Delegation Resolution, which accomplishes the following:

- Authorizes the issuance of bonds in a not to exceed amount of $96,765,000 and sets the bond capacity for the District, as a whole, including the initial bond, the second series of bonds as well as any refinancing.

- Approves the Form of a Master Trust Indenture and appoints US Bank as Trustee.
- Approves the Capital Improvement Plan that is described in the Master Engineer's Report.
- Authorizes District Counsel to file for bond validation and commence the bond process.

On MOTION by Ms. Misconi and seconded by Mr. Folstein, with all in favor, Resolution 2026-04, Authorizing the Issuance of Not to Exceed $96,765,000 the Groves of St. Lucie County Community Development District Capital Improvement Revenue Bonds, in One or More Series; Approving the Form of a Master Trust Indenture; Appointing a Trustee, Registrar and Paying Agent; Approving a Capital Improvement Program; Authorizing the Commencement of Validation Proceedings Relating To the Bonds; and Providing an Effective Date, was adopted.

TWELFTH ORDER OF BUSINESS **Engagement of Bond Financing Professionals**

Ms. Cerbone asked for approval of all three Agreements. As the Trustee Agreement is pending, Staff will review their standard agreement and make sure it conforms with other DR Horton deals and utilize it.

A. Underwriter/Investment Banker: FMSbonds, Inc.

B. Bond Counsel: Nabors, Giblin & Nickerson, P.A.

C. Trustee, Paying Agent and Registrar: US Bank, NA

On MOTION by Ms. Misconi and seconded by Mr. Folstein, with all in favor, the Underwriter/Investment Banker Agreement with FMSbonds, Inc.; the Bond Counsel Agreement with Nabors, Giblin & Nickerson, P.A.; and the Trustee, Paying Agent and Registrar Agreement with US Bank, NA, and authorizing Staff to review and utilize the Trustee's standard agreement, all in substantial form, were approved.

THIRTEENTH ORDER OF BUSINESS **Consideration of Resolution 2026-05, Designating a Date, Time and Location for Landowners' Meeting and Election; Providing for Publication; and Providing for Severability and an Effective Date [November 3, 2026 - Seats 3, 4 & 5]**

This item was deferred to the March meeting.

FOURTEENTH ORDER OF BUSINESS **Consideration of Resolution 2026-06, to Designate Date, Time and Place of Public Hearing and Authorization to Publish Notice of Such Hearing for the Purpose of Adopting Rules of Procedure; and Providing an Effective Date**

A. Rules of Procedure

B. Notices of Rule Development and Rulemaking

Ms. Cerbone presented Resolution 2026-06.

On MOTION by Mr. Folstein and seconded by Mr. Youngblood, with all in favor, Resolution 2026-06, to Designate March 30, 2026 at 11:00 a.m., at the Fairfield Inn & Suites Ft. Pierce, 6502 Metal Dr., Ft. Pierce, Florida 34945, as the Date, Time and Place of Public Hearing and Authorization to Publish Notice of Such Hearing for the Purpose of Adopting Rules of Procedure; and Providing an Effective Date, was adopted.

FIFTEENTH ORDER OF BUSINESS **Consideration of Resolution 2026-07, Appointing an Interim District Engineer for The Groves of St. Lucie County Community Development District, Authorizing Its Compensation and Providing for an Effective Date**

A. Kimley-Horn and Associates, Inc. Interim Engineering Services Agreement

Ms. Cerbone presented Resolution 2026-07 and the Kimley-Horn Engineering Agreement for Interim District Engineering Services.

Discussion ensued regarding a discrepancy in the rate schedule, a proposal containing the current hourly rates, the Certificate of Insurance (COI) and appointing Mike Dula to work with Mr. Dougherty and Mr. Earlywine regarding the rates.

On MOTION by Ms. Misconi and seconded by Mr. Youngblood, with all in favor, Resolution 2026-07, Appointing Kimley-Horn and Associates, Inc., an Interim District Engineer for The Groves of St. Lucie County Community Development District, Authorizing Its Compensation and Providing for an Effective Date, in substantial form, was adopted.

SIXTEENTH ORDER OF BUSINESS **Authorization to Request for Services**

Ms. Cerbone presented the following:

A. Request for Qualifications (RFQ) for Engineering Services

B. Request for Proposals (RFP) for Annual Audit Services

- **Designation of Board of Supervisors as Audit Committee**

Ms. Cerbone stated the responses will be presented at the March meeting.

On MOTION by Mr. Folstein and seconded by Mr. Youngblood, with all in favor, authorizing District Management to advertise the RFQ for Engineering Services and the RFP for Annual Audit Services, and designating the Board as the Audit Committee, was approved.

SEVENTEENTH ORDER OF BUSINESS **Consideration of Resolution 2026-08, Authorizing an Individual Designated by the Board of Supervisors to Act as the District's Purchasing Agent for the Purpose of Procuring, Accepting, and Maintaining Any and All Construction Materials Necessary for the Construction, Installation, Maintenance or Completion of the District's Infrastructure Improvements as Provided in the District's Adopted Improvement Plan; Providing for the Approval of a Work Authorization; Providing for Procedural Requirements for the Purchase of Materials; Approving the Form of a Purchase Requisition Request; Approving the Form of a Purchase Order; Approving the Form of a Certificate of Entitlement; Authorizing the Purchase of Insurance; Providing a Severability Clause; and Providing an Effective Date**

Mr. Earlywine presented Resolution 2026-08.

On MOTION by Ms. Misconi and seconded by Mr. Youngblood, with all in favor, Resolution 2026-08, Authorizing an Individual Designated by the Board of Supervisors to Act as the District's Purchasing Agent for the Purpose of Procuring, Accepting, and Maintaining Any and All Construction Materials Necessary for the Construction, Installation, Maintenance or Completion of the District's Infrastructure Improvements as Provided in the District's Adopted Improvement Plan; Providing for the Approval of a Work Authorization; Providing for Procedural Requirements for the Purchase of Materials; Approving the Form of a Purchase Requisition Request; Approving the Form of a Purchase Order; Approving the Form of a Certificate of Entitlement; Authorizing the Purchase of Insurance; Providing a Severability Clause; and Providing an Effective Date, was adopted.

EIGHTEENTH ORDER OF BUSINESS **Discussion/Consideration/Ratification: Goals and Objectives Reporting FY2026 [HB7013 - Special Districts Performance Measures and Standards Reporting]**

A. October 1, 2024 - September 30, 2025 [Posted]

B. October 1, 2025 - September 30, 2026

> **On MOTION by Mr. Youngblood and seconded by Mr. Folstein, with all in favor, the Fiscal Year 2025 Goals and Objectives Reporting, was ratified, and the Fiscal Year 2026 Goals Objectives Reporting Performance Measures and Standards, were approved.**

NINETEENTH ORDER OF BUSINESS **Consideration of Resolution 2026-09, Designating Dates, Times and Locations for Regular Meetings of the Board of Supervisors of the District for the Remainder of Fiscal Year 2025/2026 and Providing for an Effective Date**

This item was deferred.

TWENTIETH ORDER OF BUSINESS **Consideration of Resolution 2026-10, Designating the Location of the Local District Records Office and Providing an Effective Date**

This item was deferred.

TWENTY-FIRST ORDER OF BUSINESS **Consideration of Project Related Items**

Mr. Earlywine presented the following and suggested approval in substantial form:

A. Temporary Construction Easement

B. Acquisition Agreement

> **On MOTION by Ms. Misconi and seconded by Mr. Folstein, with all in favor, the Temporary Construction Easement and the Acquisition Agreement, both in substantial form and subject to the name of the Developer being updated on both documents at the time of execution, were approved.**

TWENTY-SECOND ORDER OF BUSINESS **Acceptance of Unaudited Financial Statements as of December 31, 2025**

On MOTION by Mr. Folstein and seconded by Mr. Youngblood, with all in favor, the Unaudited Financial Statements as of December 31, 2025, were accepted.

TWENTY-THIRD ORDER OF BUSINESS **Approval of September 25, 2025 Public Hearings and Regular Meeting Minutes**

On MOTION by Mr. Folstein and seconded by Mr. Youngblood, with all in favor, the September 25, 2025 Public Hearings and Regular Meeting Minutes, as presented, were approved.

TWENTY-FOURTH ORDER OF BUSINESS **Staff Reports**

A. District Counsel: Kutak Rock LLP

B. District Engineer (Interim): Kimley-Horn and Associates, Inc.

There were no District Counsel or District Engineer reports.

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

- **NEXT MEETING DATE: TBD**
  - **QUORUM CHECK**

The next meeting will be held on March 30, 2026 at 11:00 a.m.

TWENTY-FIFTH ORDER OF BUSINESS **Public Comments**

No members of the public spoke.

TWENTY-SIXTH ORDER OF BUSINESS **Board Members' Comments/Requests**

There were no Board Members' comments or requests.

TWENTY-SEVENTH ORDER OF BUSINESS **Adjournment**

On MOTION by Mr. Folstein and seconded by Mr. Youngblood, with all in favor, the meeting adjourned at 11:59 a.m.

[SIGNATURES APPEAR ON THE FOLLOWING PAGE]

438
439
440
441 _____ _____
442 Secretary/Assistant Secretary Chair/Vice Chair

THE GROVES OF ST. LUCIE COUNTY

COMMUNITY DEVELOPMENT DISTRICT

STAFF REPORTS

THE GROVES OF ST. LUCIE COUNTY
COMMUNITY DEVELOPMENT DISTRICT
Performance Measures/Standards & Annual Reporting Form
October 1, 2025 – September 30, 2026

1. COMMUNITY COMMUNICATION AND ENGAGEMENT

Goal 1.1 Public Meetings Compliance

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

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

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

Achieved: Yes ☐ No ☐

Goal 1.2 Notice of Meetings Compliance

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

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

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

Achieved: Yes ☐ No ☐

Goal 1.3 Access to Records Compliance

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

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

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

Achieved: Yes ☐ No ☐

2. INFRASTRUCTURE AND FACILITIES MAINTENANCE

Goal 2.1 District Infrastructure and Facilities Inspections

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

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

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

Achieved: Yes ☐ No ☐

3. FINANCIAL TRANSPARENCY AND ACCOUNTABILITY

Goal 3.1 Annual Budget Preparation

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

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

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

Achieved: Yes ☐ No ☐

Goal 3.2 Financial Reports

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

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

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

Achieved: Yes ☐ No ☐

Goal 3.3 Annual Financial Audit

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

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

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

Achieved: Yes ☐ No ☐

District Manager

Christopher D. Conti

Print Name

1/22/2026

Date

Chair/Vice Chair, Board of Supervisors

Michael Folstein

Print Name

1-22-2026

Date