

BARTRAM PARK
Community Development District

October 23, 2024

AGENDA

Bartram Park

Community Development District

475 West Town Place, Suite 114, St. Augustine, FL 32092
Phone: 904-940-5850 - Fax: 904-940-5899

October 16, 2024

Board of Supervisors
Bartram Park Community Development District

Dear Board Members:

The Bartram Park Community Development District Board of Supervisors is scheduled for **Wednesday, October 23, 2024 at 11:00** a.m. at the offices of England-Thims & Miller, Inc., 14775 Old St. Augustine Road, Jacksonville, Florida 32258.

Following is the advance agenda for this meeting:

- I. Roll Call
- II. Public Comment
- III. Approval of Minutes of the July 24, 2024 Meeting
- IV. Ratification of CDD Goals & Objectives
- V. Consideration of Responses to RFQ for Engineering Services
- VI. Ratification of Audit Engagement Letter for Fiscal Year 2024 Audit
- VII. Other Business
- VIII. Staff Reports
 - A. Attorney
 - B. Engineer
 - C. Manager
- IX. Audience Comments
- X. Supervisor's Requests
- XI. Financial Reports
 - A. Balance Sheet and Statement of Revenues & Expenditures for the Period

Ending September 30, 2024

B. Assessment Receipt Schedules

C. Approval of Check Register

XII. Next Scheduled Meeting – January 22, 2025 at 11:00 a.m. @ England-Thims & Miller

XIII. Adjournment

THIRD ORDER OF BUSINESS

MINUTES OF MEETING
BARTRAM PARK
COMMUNITY DEVELOPMENT DISTRICT

The regular meeting of the Board of Supervisors of the Bartram Park Community Development District was held on Wednesday, July 24, 2024 at 11:00 a.m. at the offices of England-Thims & Miller, Inc, 14775 Old St. Augustine Road, Jacksonville, Florida.

Present and constituting a quorum were:

James Griffith	Chairman
Trisston Brown	Vice Chairman
Joan Nero	Supervisor
Larry Lokey	Supervisor
Lynda Learn	Supervisor

Also present were:

Jim Oliver	District Manager
Wes Haber <i>by phone</i>	District Counsel

FIRST ORDER OF BUSINESS

Roll Call

Mr. Oliver called the meeting to order at 11:00 a.m. Five Board members were present constituting a quorum.

SECOND ORDER OF BUSINESS

Public Comment

There were no public comments.

FOURTH ORDER OF BUSINESS

Approval of Minutes of the April 24, 2024 Meeting

Mr. Oliver presented the minutes of the April 24, 2024 Board of Supervisors meeting and asked for any corrections. The Board had no corrections.

On MOTION by Mr. Griffith, seconded by Mr. Brown, with all in favor, the April 24, 2024 Board of Supervisors Meeting Minutes, were approved.

FIFTH ORDER OF BUSINESS

Acceptance of Fiscal Year 2023 Audit Report

Mr. Oliver noted the CDD is a unit of government therefore is required to conduct an audit each year. The audit was performed by Grau & Associates and is a clean audit. It has been provided to the auditor general.

On MOTION by Mr. Brown, seconded by Mr. Griffith, with all in favor, the Acceptance of Fiscal Year 2023 Audit Report, was approved.

SIXTH ORDER OF BUSINESS

Public Hearing

A. Overview of Fiscal Year 2025 Budget

Mr. Oliver stated a proposed budget was approved at the April meeting. There is no increase in assessments so it remains at \$33.75 for the year. The budget can't be increased at this point. He asked for a motion to open the public hearing.

On MOTION by Mr. Griffith, seconded by Ms. Nero, with all in favor, Opening the Public Hearing, was approved.

B. Public Hearing

Mr. Oliver noted the public hearing is open and asked for any public comment regarding the budget. Hearing no comments. He asked for a motion to close the public hearing.

On MOTION by Mr. Griffith, seconded by Ms. Nero, with all in favor, Closing the Public Hearing, was approved.

C. Consideration of Resolution 2024-04, Relating to Annual Appropriations and Adopting the Budget for Fiscal Year 2025

Mr. Oliver asked for a motion to adopt Resolution 2024-04.

On MOTION by Mr. Griffith, seconded by Ms. Nero, with all in favor, Resolution 2024-04, Relating to Annual Appropriations and Adopting the Budget for Fiscal Year 2025, was approved.

D. Consideration of Resolution 2024-05, Imposing Special Assessments and Certifying an Assessment Roll

Mr. Oliver stated this assessment roll will be provided to the Duval County tax collector by the July 31st deadline imposed. The assessments will be a line item and the property tax bills will go out November 1st. He asked for a motion to adopt Resolution 2024-05.

On MOTION by Mr. Griffith, seconded by Ms. Nero, with all in favor, Resolution 2024-05, Imposing Special Assessments and Certifying an Assessment Roll, was approved.

SEVENTH ORDER OF BUSINESS Other Business

Mr. Oliver stated that he had no other business.

EIGHTH ORDER OF BUSINESS Staff Reports

A. Attorney

Ms. Brown had nothing to report but would take any questions for Wes if there are any.

B. Engineer

Mr. Oliver noted they are without an engineer right now. Matt resigned. With the Boards direction they will issue the engineering RFQ and get qualifications for engineering firms to serve as District Engineer. He asked for a motion for the District to issue an RFQ for engineering services.

On MOTION by Mr. Brown, seconded by Ms. Nero, with all in favor, the RFQ for Engineering Services, was approved.

C. Manager

1. Report on the Number of Registered Voters (6,034)

Mr. Oliver noted a letter from the Supervisor of Elections states there are now 6,034 registered voters living in Bartram Park CDD. The Board discussed when paving of the last part of the South end is going to take place. Mr. Oliver will follow up with the City of Jacksonville.

2. Discussion of Fiscal Year 2025 Meeting Schedule

Mr. Oliver stated the meeting schedule is the same quarterly schedule in the same location. The meeting dates include October 23, 2024, January 22, 2025, April 23, 2025 and July 23, 2025.

On MOTION by Mr. Brown, seconded by Mr. Griffith, with all in favor, the Fiscal Year 2025 Meeting Schedule, was approved.

THIRD ORDER OF BUSINESS

Organizational Matters

A. Acceptance of Resignation from Supervisor Donald Smith

Mr. Oliver asked for a motion to accept Donald Smiths resignation.

On MOTION by Mr. Brown, seconded by Mr. Griffith, with all in favor, the Resignation of Donald Smith, was approved.

B. Appointment of New Supervisor to Fill Unexpired Term of Office (11/2026)

Mr. Oliver asked for any nominations to fill seat #2 vacated by Pat Evert. Mr. Griffith nominated Lynda Learn.

On MOTION by Mr. Griffith, seconded by Ms. Nero, with all in favor, the Appointment of Lynda Learn to Seat #2, was approved.

Mr. Oliver asked for any nominations to fill seat #4 vacated by Don Smith. Mr. Griffith nominated Larry Lokey.

On MOTION by Mr. Griffith, seconded by Ms. Nero, with all in favor, the Appointment of Larry Lokey to Seat #4, was approved.

C. Oath of Office for Newly Appointed Supervisor

Mr. Oliver administered the Oath of Office to Lynda Learn and Larry Lokey. He reviewed Sunshine Law, Public Records Law, and Ethics Law.

D. Election of Officers, Resolution 2024-02

**This item was taken out of order.*

NINTH ORDER OF BUSINESS

Audience Comments

Mr. Oliver stated there are no members of the public present today.

TENTH ORDER OF BUSINESS

Supervisor's Requests

Mr. Brown asked about raising compensation for Supervisors given the requirement of more continued education and Ethics training. Mr. Oliver noted Chapter 190 sets Supervisor pay and it is \$200 per meeting up to a maximum of \$4,800 per year that would be for 24 meetings. District Counsel is not aware of any changes but will review.

Mr. Griffith asked how to propose this to the lobbyists to propose an increase to the Statute. It is a little outdated given all the new educational or CLE requirements that Board members have and seems prudent to look at it again. Mr. Brown (DC) reviewed how this could get proposed and noted he will mention it to Wes Haber.

A Board member asked when Racetrack is going to be finished, the second roadway. Mr. Oliver will look into that.

ELEVENTH ORDER OF BUSINESS

Financial Reports

A. Balance Sheet and Statement of Revenues & Expenditures for the Period Ending June 30, 2024

Mr. Oliver presented the financials through June 30th. No unusual variances.

B. Assessment Receipt Schedules

Mr. Oliver stated the District is fully collected for FY24.

C. Approval of Check Register

Mr. Oliver presented the check register and noted it is in the agenda packet for review.

On MOTION by Mr. Brown, seconded by Mr. Griffith, with all in favor, the Check Register, was approved.
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TWELFTH ORDER OF BUSINESS

**Next Scheduled Meeting – To Be Determined
at 11:00 a.m. @ England-Thims & Miller**

Mr. Oliver stated the next meeting will be October 23, 2024 at 11:00 at Bartram Springs Amenity Center at 14530 East Cherry Lake Dr., Jacksonville, Florida.

THIRTEENTH ORDER OF BUSINESS

Adjournment

On MOTION by Mr. Griffith, seconded by Ms. Nero, with all in favor, the Meeting was adjourned.

Secretary/Assistant Secretary

Chairman/Vice Chairman

FOURTH ORDER OF BUSINESS



Memorandum

To: Board of Supervisors

From: District Management

Date: July 10, 2024

RE: HB7013 – Special Districts Performance Measures and Standards

To enhance accountability and transparency, new regulations were established for all special districts, by the Florida Legislature, during their 2024 legislative session. Starting on October 1, 2024, or by the end of the first full fiscal year after its creation (whichever comes later), each special district must establish goals and objectives for each program and activity, as well as develop performance measures and standards to assess the achievement of these goals and objectives. Additionally, by December 1 each year (initial report due on December 1, 2025), each special district is required to publish an annual report on its website, detailing the goals and objectives achieved, the performance measures and standards used, and any goals or objectives that were not achieved.

District Management has identified the following key categories to focus on for Fiscal Year 2025 and develop statutorily compliant goals for each:

- Community Communication and Engagement
- Infrastructure and Facilities Maintenance
- Financial Transparency and Accountability

Additionally, special districts must provide an annual reporting form to share with the public that reflects whether the goals & objectives were met for the year. District Management has streamlined these requirements into a single document that meets both the statutory requirements for goal/objective setting and annual reporting.

The proposed goals/objectives and the annual reporting form are attached as exhibit A to this memo. District Management recommends that the Board of Supervisors adopt these goals and objectives to maintain compliance with HB7013 and further enhance their commitment to the accountability and transparency of the District.

Exhibit A:
Goals, Objectives and Annual Reporting Form

Bartram Park Community Development District Performance Measures/Standards & Annual Reporting Form

October 1, 2024 – September 30, 2025

1. Community Communication and Engagement

Goal 1.1: Public Meetings Compliance

Objective: Hold at least three 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 three board meetings were held during the Fiscal Year.

Achieved: Yes No

Goal 1.2: Notice of Meetings Compliance

Objective: Provide public notice of meetings in accordance with Florida Statutes, 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 per Florida statute on at least two mediums (i.e., newspaper, CDD website, electronic communications).

Achieved: Yes No

2. Infrastructure and Facilities Maintenance

Goal 2.1: Field Management and/or District Management Site Inspections

Objective: Field manager and/or district manager will conduct quarterly inspections per District Management services agreement to ensure safety and proper functioning of the District's infrastructure.

Measurement: Field manager and/or district manager visits were successfully completed, as evidenced by field manager and/or district manager's reports, notes or other record keeping method.

Standard: 100% of site visits were successfully completed as described within field management services agreement

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 & 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: Annual audit, current fiscal year budget with any amendments, and most recent financials within the latest agenda package.

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

Standard: CDD website contains 100% of the following information: Most recent annual audit, most recent 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 and publish the results to the CDD website for public inspection, and transmit to the State of Florida.

Measurement: Timeliness of audit completion and publication as evidenced by meeting minutes showing board approval and annual audit is available on the CDD's website and transmitted to the State of Florida.

Standard: Audit was completed by an independent auditing firm per statutory requirements and results were posted to the CDD website and transmitted to the State of Florida.

Achieved: Yes No

Chair/Vice Chair: _____
Print Name: _____
Bartram Park Community Development District

Date: _____

District Manager: _____
Print Name: _____
Bartram Park Community Development District

Date: _____

FIFTH ORDER OF BUSINESS

QUALIFICATIONS

Engineering Services

Prepared for:

**Bartram Park
Community Development
District**

Duval County, Florida

Prepared by:



October 1, 2024



October 1, 2024

District Managers Office

Jim Oliver

✉ joliver@gmsnf.com

Alliant Engineering, Inc.

10475 Fortune Parkway, Suite 101
Jacksonville, FL 32256

904.240.1351 MAIN

www.alliant-inc.com

**Building better communities with
excellence and passion.**

RE: Engineering Services for Bartram Park Community Development District

Dear Mr. Oliver and Members of the Evaluation Committee:

Alliant Engineering, Inc. (Alliant) and our teaming partners **Meskel & Associates Engineering** (MAE) and **ECS Florida, LLC** (ECS) are please to submit our proposal for Engineering Services. **Curt Wimpée, PE** is Alliant’s Southeast Regional Manager and will serve as the Quality Control Manager while **David R. Landing, PE** will serve as the Project Manager and will be the CDD’s primary point-of-contact.

Alliant was founded in Minneapolis in 1995 and has grown from a company with one employee into an organization of over 177 diverse professionals and support staff. We have been providing services to clients like the Bartram Park Community Development District for over 28 years. In 2015 expanded to Jacksonville, FL to better serve its clients in the southeast region. Alliant is an S-Corporation providing a range of comprehensive services including but not limited to civil engineering, construction services, intelligent transportation systems, landscape architecture, land survey, roadway design, structures, traffic engineering, and water resources.

Alliant’s business philosophy is to keep our values of community, excellence, creating value, collaboration, being future focused, and integrity at the forefront of everything we do. Our corporate mission to Build Better Communities with Excellence and Passion is evident within our culture and our outstanding Client Service distinguishes us from other companies.

We understand you are looking for a consulting partner that is more than just a designer or engineer. You expect a partner that can lead and manage projects from concept through construction and efficiently address any challenges along with way. As your Project Manager, **David R. Landing, PE** will serve as your primary point of contact and will ensure that our team will be focused, flexible, and responsive to the needs of the CDD and its residents. We will focus on timely, honest, and open communication and delivering quality from the day the project starts through bidding, construction, and closeout.

Alliant is interested in pursuing this solicitation to continue to grow our services throughout Florida. We are excited to serve the Bartram Park CDD and are committed to providing the highest quality service for selected projects. Thank you for your consideration and we look forward to partnering with you. Please feel free to contact me with any questions or if you require any additional information.

Sincerely,

Alliant Engineering, Inc.

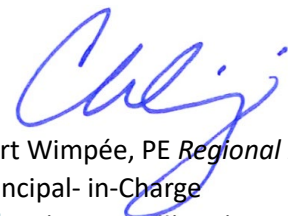
Curt Wimpée, PE *Regional Manager*



David R. Landing, PE *Project Manager*

✉ dlanding@alliant-inc.com

☎ 904.513.3218



Curt Wimpée, PE *Regional Manager*
Principal- in-Charge

✉ cwimpee@alliant-inc.com

☎ 904.647.5383

ARCHITECT-ENGINEER QUALIFICATIONS

PART I - CONTRACT-SPECIFIC QUALIFICATIONS

A. CONTRACT INFORMATION

1. TITLE AND LOCATION <i>(City and State)</i> Request for Qualifications for Engineering Services for Bartram Park Community Development District, Duval County, Florida	
2. PUBLIC NOTICE DATE 08/08/2024	3. SOLICITATION OR PROJECT NUMBER N/A

B. ARCHITECT-ENGINEER POINT OF CONTACT

4. NAME AND TITLE David R. Landing, PE / Project Manager		
5. NAME OF FIRM Alliant Engineering, Inc.		
6. TELEPHONE NUMBER (904) 513-3218	7. FAX NUMBER N/A	8. E-MAIL ADDRESS dlanding@alliant-inc.com

C. PROPOSED TEAM

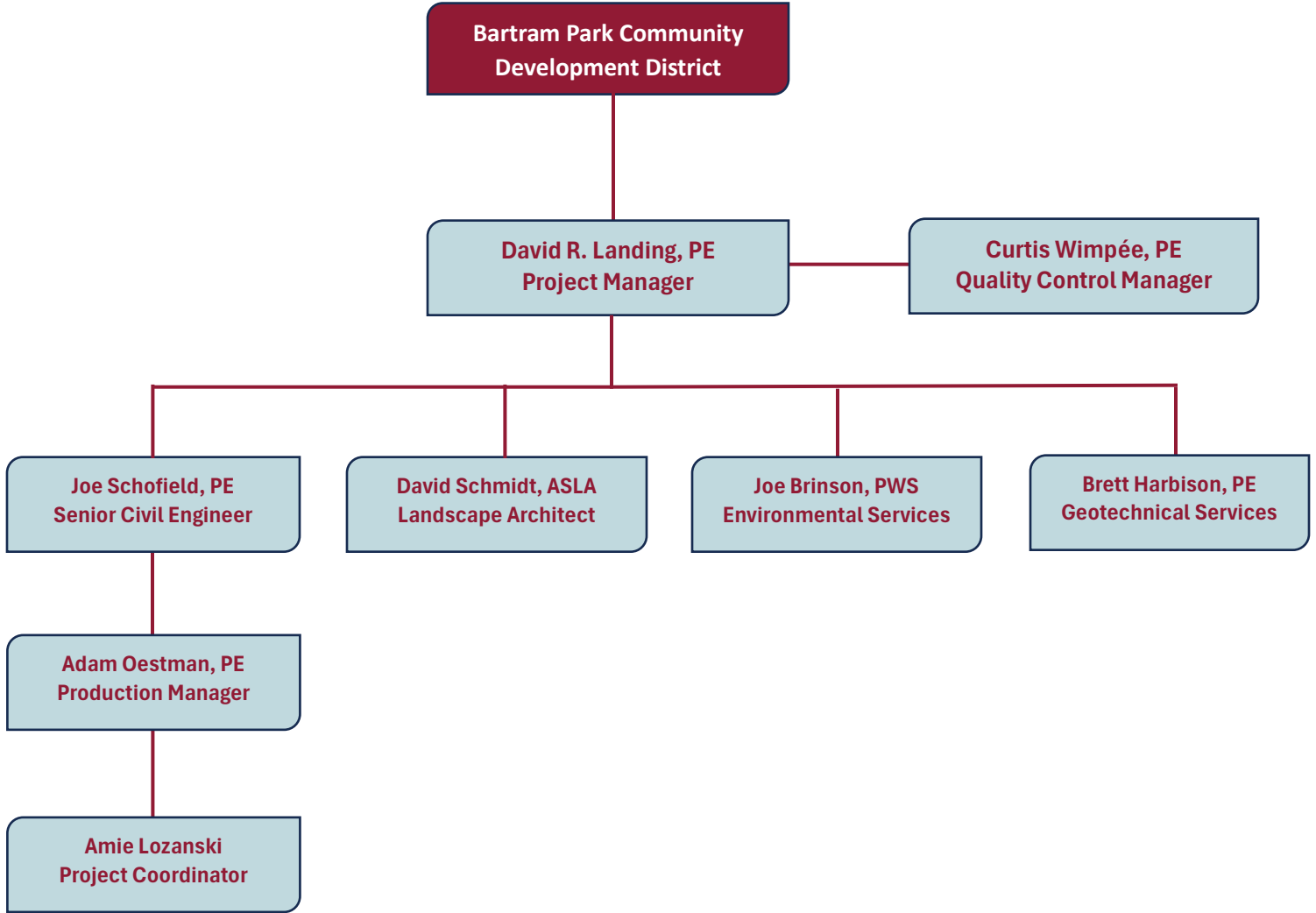
(Complete this section for the prime contractor and all key subcontractors.)

	(Check)			9. FIRM NAME	10. ADDRESS	11. ROLE IN THIS CONTRACT
	PRIME	J-V	PARTNER SUBCON- TRACTOR			
a.	<input checked="" type="checkbox"/>			Alliant Engineering, Inc. <input checked="" type="checkbox"/> CHECK IF BRANCH OFFICE	10475 Fortune Parkway, Suite 101 Jacksonville, Florida 32256	Project Management, Civil Engineering, and Landscape Services
b.			<input checked="" type="checkbox"/>	ECS Florida, LLC <input checked="" type="checkbox"/> CHECK IF BRANCH OFFICE	11554 Davis Creek Court Jacksonville, FL 32256	Environmental Services
c.			<input checked="" type="checkbox"/>	Meskel & Associates Engineering CHECK IF BRANCH OFFICE	3728 Philips Highway, Suite 208 Jacksonville, FL 32207	Geotechnical Services
d.				Alliant Florida, Inc. (A wholly owned subsidiary of Alliant Engineering, Inc.) <input checked="" type="checkbox"/> CHECK IF BRANCH OFFICE	10475 Fortune Parkway, Suite 101 Jacksonville, FL 32256	Land Survey Services
e.						
f.						

D. ORGANIZATIONAL CHART OF PROPOSED TEAM

X *(Attached, Exhibit 1)*

Exhibit 1. Organizational Chart



E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person)

12. NAME David R. Landing, PE	13. ROLE IN THIS CONTRACT Project Manager	14. YEARS EXPERIENCE	
		a. TOTAL 27	b. WITH CURRENT FIRM Less Than 1 Year
15. FIRM NAME AND LOCATION (City and State) Alliant Engineering, Inc. (Jacksonville, FL)			
16. EDUCATION (Degree and Specialization) BS, Civil Engineering, University of Florida (UNF) AS, Civil Engineering Technology, Savannah Technical College		17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline) Professional Engineer in Florida (80483)	

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

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

19. RELEVANT PROJECTS

a.	(1) TITLE AND LOCATION (City and State) SAWMILL BRANCH SUBDIVISION, MULTIPLE PHASED PROJECT, CITY OF PALM COAST, FL	(2) YEAR COMPLETED	
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ENTER PROJECT DESCRIPTION/DUTIES HERE	PROFESSIONAL SERVICES 2024	CONSTRUCTION (If applicable) 2024
<input checked="" type="checkbox"/> Check if project performed with current firm.			
b.	(1) TITLE AND LOCATION (City and State) HASTINGS WTP TO SR 207 12-INCH WATER MAIN, SJCUD, HASTINGS, FL	(2) YEAR COMPLETED	
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE David served as the project manager, Engineer of Record, and senior pipeline design engineer for approximately 4,650 LF of 12-inch PVC water main installed by open-cut trenching along with associated valving, hydrants, fittings, and appurtenances. The project also included approx. 2,700 LF of 16-inch HDPE water main installed thru three separate HDD trenchless installations. Project challenges included navigating road corridors with narrow ROW which were shared with an FPL high-voltage transmission overhead powerline and coordinating proposed and temporary construction easements with property owners. David laid out the geometry for the project alignment, assisted in preparing construction drawings, and coordinated with survey and geotechnical exploration subcontractors.	PROFESSIONAL SERVICES 2024	CONSTRUCTION (If applicable) 2024
<input type="checkbox"/> Check if project performed with current firm.			
c.	(1) TITLE AND LOCATION (City and State) CWRF TRANSMISSION MAIN BYPASS & REDUNDANCY CONCEPTUAL PLAN, ECUA, PENSACOLA, FL	(2) YEAR COMPLETED	
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE David served as pipelines engineer on this project. Route planning, feasibility, and constructability input to add redundancy to an existing 3,500 LF of 30-inch, 10,050 LF of 42-inch, 53,500 LF of 48-inch, and 5,200 LF of 54-inch large diameter DI transmission force main transporting sewerage from ECUA's Main Street Water Plant situated along Pensacola Bay to ECUA's Chemstrand Treatment Plant in Escambia County. For this project, he personally participated in team meetings, helped with route selection, made recommendations in support of and produced route planning sketches for the project, and investigated and made recommendations for bypass points of connection between the various force main segments.	PROFESSIONAL SERVICES 2023	CONSTRUCTION (If applicable) 2023
<input type="checkbox"/> Check if project performed with current firm.			
d.	(1) TITLE AND LOCATION (City and State) SR 207 WATER MAIN EXTENSION – PH. III, SJCUD, ST. JOHNS COUNTY, FL	(2) YEAR COMPLETED	
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE For the above referenced project David served as QA/QC engineer and site construction inspector for the design and construction of 2,900 LF of 24-inch PVC water main within St. Johns County Utility Department (SJCUD) easements and Florida Department of Transportation (FDOT) Right-of-Ways (ROW). The project also consisted of a 42-inch steel cased jack and auger bore crossing FDOT's SR 206 and a 30-inch High-Density Polyethylene (HDPE) HDD crossing Interstate 95. Permitting was required by FDOT and Florida Department of Environmental Protection (FDEP) for wetlands crossing and impacts. For this project he personally reviewed the construction drawings at various project milestones for constructability and to ensure the projects met client expectations. David also reviewed contractor submittals for materials and construction methods and performed onsite inspections of installation of the water main, wet tapping for connection to the existing water main and the HDD installation under Interstate 95.	PROFESSIONAL SERVICES 2023	CONSTRUCTION (If applicable) 2023
<input type="checkbox"/> Check if project performed with current firm.			

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

12. NAME Curt Wimpée, PE	13. ROLE IN THIS CONTRACT Quality Control Manager	14. YEARS EXPERIENCE	
		a. TOTAL 28	b. WITH CURRENT FIRM 8
15. FIRM NAME AND LOCATION (City and State) Alliant Engineering, Inc. (Jacksonville, FL)			
16. EDUCATION (Degree and Specialization) BS, Civil Engineering, University of Minnesota		17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline) Professional Engineer in Florida (79764), Minnesota (40487), Georgia (031340), N. Carolina (053415), S. Carolina (41355), and Tennessee (125610).	

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

Mr. Wimpée is the VP of the Southeast Region with 28 years of experience in municipal engineering, land development, and transportation. Curt's experience includes localized and regional utility extensions, lift stations, city and DOT roadway reconstructions, new roadways, MOT plans, signage and striping plans, concrete and asphalt pavement design, storm water management systems, regional drainage studies, residential mixed use, and large-scale commercial developments.

19. RELEVANT PROJECTS

a.	(1) TITLE AND LOCATION (City and State) CITY ENGINEER (CONSULTANT) FOR THE CITY OF BUNNELL, FL	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES ONGOING	CONSTRUCTION (If applicable)
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm. Engineer of Record for numerous city infrastructure projects. Projects include roadway paving/assessment/rehabilitation/replacement, stormwater system design and modeling, water main (potable and reclaim) extensions/rehabilitation/replacements, sanitary sewer design and rehabilitation. Cost estimating and engineering reports associated with all aspects of these infrastructure projects. City Council presentations and representation, public messaging, and interaction.			
b.	(1) TITLE AND LOCATION (City and State) CITY ENGINEER (CONSULTANT) FOR THE CITY OF FLAGLER BEACH, FL	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES ONGOING	CONSTRUCTION (If applicable)
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm. Engineer of Record for numerous city infrastructure projects some of which included roadway paving/assessment/rehabilitation/replacement stormwater system design and modeling, water main (potable and reclaim) extensions/rehabilitation/replacements, sanitary sewer design/rehabilitation. Cost estimating and engineering reports associated with all aspects of these infrastructure projects. City Council presentation and representation. Public messaging and interaction.			
c.	(1) TITLE AND LOCATION (City and State) CIVIL ENGINEER FOR THE CITY OF MENDOTA HEIGHTS, MN	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2000	CONSTRUCTION (If applicable) N/A
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input type="checkbox"/> Check if project performed with current firm. Performed as Engineer of Record for numerous city infrastructure projects which included roadway paving/assessment/rehabilitation/replacement, stormwater system design and modeling, water main (potable and reclaim) extensions/rehabilitation/replacements, sanitary sewer design/rehabilitation. Cost estimating and engineering reports associated with all aspects of these infrastructure projects. City Council presentations and representation. Public messaging and interaction.			
d.	(1) TITLE AND LOCATION (City and State) CITY ENGINEER (CONSULTANT) FOR THE CITY OF TWO HARBORS, MN	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2014	CONSTRUCTION (If applicable) N/A
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input type="checkbox"/> Check if project performed with current firm. Performed as City Engineer in all aspects of design for city improvement projects. Representative projects included approximately 6 miles of roadway and utility reconstruction for rural to urban street reconstructions. Tasks included complete corridor survey of projects, design, cost estimating, bidding and award, and full-time construction inspection.			
e.	(1) TITLE AND LOCATION (City and State) CITY ENGINEER (CONSULTANT) FOR THE CITY OF SCANLON, MN	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2014	CONSTRUCTION (If applicable) N/A
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input type="checkbox"/> Check if project performed with current firm. Performed as Engineer of Record for numerous city infrastructure projects. Projects included roadway/paving/assessment/rehabilitation/replacement, stormwater system design and modeling, water main (potable and reclaim) extensions/rehabilitation/replacements, sanitary sewer design/rehabilitation. Cost estimating and engineering reports associated with all aspects of these infrastructure projects. City Council presentations and representation. Public messaging and interaction.			

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

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

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

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

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (If applicable)
a. SHADOW CREST AT ROLLING HILLS COMMUNITY DEVELOPMENT DISTRICT (CDD) (PHASES 3B AND 3D) CITY OF GREEN COVE SPRINGS, FL	2023	2023
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm. Mr. Schofield assisted the CDD to secure electrical and landscape maintenance easements. He also reviewed all contractor, vendor, and supplier invoices and pay applications to help ensure proper use of the bond funds. Scope included cost estimating and writing the Engineer's Report for Shadow Crest phase of the district full planned build-out.		
b. BEACHVIEW COVE SUBDIVISION, CITY OF ORMOND BEACH, FL	2023	N/A
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm. Project Manager overseeing design and permitting for a 28-lot single family subdivision with private lift station on A-1-A adjacent to the Atlantic Ocean. All entitlements received and construction is underway. The project includes a planned FPL power pole relocation, work within the coastal construction control line (CCCL), and coordination of turtle friendly street lighting design.		
c. PONCE PRESERVE SUBDIVISION, CITY OF PALM COAST, FL	2023	N/A
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm. Project Manager overseeing design and permitting for a 74-lot single family subdivision. All entitlements have been received; construction start date is undetermined at this time.		
d. RYAN'S LANDING SUBDIVISION, CITY OF PALM COAST, FL	2023	N/A
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm. Project Manager overseeing design and permitting for a 95-lot single family subdivision. All entitlements have been received; construction start date is undetermined at this time.		
e.		
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input type="checkbox"/> Check if project performed with current firm.		

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

12. NAME Adam Oestman, PE	13. ROLE IN THIS CONTRACT Production Manager	14. YEARS EXPERIENCE	
		a. TOTAL 6	b. WITH CURRENT FIRM 3
15. FIRM NAME AND LOCATION (City and State) Alliant Engineering, Inc. (Jacksonville, FL)			
16. EDUCATION (Degree and Specialization) BS, Civil Engineering Technology, Murray State University		17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline) Professional Engineer in Florida (98440)	

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

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

19. RELEVANT PROJECTS

	(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION (If applicable)
a.	RECLAIM MAIN EXTENSION, CITY OF DELAND, FL	2023	N/A
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm. Lead design engineer preparing the construction documents for a +/- 6,000 LF reclaim main extension.		
b.	SAWMILL BRANCH SUBDIVISION, MULTIPLE PHASED PROJECT, CITY OF PALM COAST, FL	2023	ONGOING
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm. Lead design engineer preparing the construction documents for multiple single family residential subdivision phases totaling over 1,000 lots.		
c.	HYMON CIRCLE DRAINAGE IMPROVEMENTS, CITY OF BUNNELL, FL	2023	N/A
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input type="checkbox"/> Check if project performed with current firm. Design engineer preparing construction documents for a two-phase project in the City of Bunnell, including +/- 2,000 LF of roadside drainage improvements as well as +/- 3,000 LF of existing drainage ditch improvements.		
d.	SPRING LAKE PARK CDD, MULTIPLE PHASE SUBDIVISION, CITY OF PALM COAST, FL	2022	ONGOING
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm. Preparing construction documents, cost estimate, and associated construction administration for a single-family subdivision with multiple phases for a total of 421 lots.		
e.	SHADOWCREST AT ROLLING HILLS SINGLE FAMILY SUBDIVISION, CITY OF GREEN COVE SPRINGS, FL	2021	
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm. Lead design engineer preparing construction documents for a single-family, 247 lot subdivision as well as associated construction administration throughout the project.		

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

12. NAME David Schmidt, ASLA	13. ROLE IN THIS CONTRACT Landscape Architect	14. YEARS EXPERIENCE	
		a. TOTAL 16	b. WITH CURRENT FIRM 1 Year
15. FIRM NAME AND LOCATION (City and State) Alliant Engineering, Inc. (Jacksonville, FL)			
16. EDUCATION (Degree and Specialization) BS, Landscape Architecture, University of Arkansas, Minor in Horticulture		17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline) ASLA; Currently pursuing licensure as a Landscape Architect in Florida in 2024	

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

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

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (If applicable)
a. SWEETGRASS, CITY OF ST. MARY'S, GA	2023	
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm. Served as project manager and designer responsible for the neighborhood entry, common area, pocket parks, beer garden, dog walk, and amenities at the clubhouse. Sweetgrass is a 150-acre community that will feature 312 multifamily units, 194 townhomes, 143 single family homes, and 212,600 SF of commercial space. The Sweetgrass community will be home to almost 650 families in a walkable, mixed-use neighborhood that provides not only housing, but places for working, shopping, recreation, and civic engagement.		
b. REVERIE AT TRAILMARK, CITY OF ST. AUGUSTINE, FL	2020	2023
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm. David served as the project manager and designer responsible for the neighborhood entry, common area, pocket parks, beer garden, dog park, and amenities at the clubhouse. Reverie is a 55+ community located in St. Augustine, FL permitted as a Community Development District that consists of 487 single family homes and a 4,600 SF clubhouse.		
c. BRADENTON RIVERWALK, CITY OF BRADENTON, FL	2012	2012
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input type="checkbox"/> Check if project performed with current firm. David and his team were responsible for multiple project components, such as data collection, landscape design, renderings, and 3D modeling for the master plan. Kimley-Horn completed the master planning process for the 1.5-mile-long riverfront area in Bradenton known as the Riverwalk. Services included grant funding analysis, master planning, public involvement, design development, and stakeholder coordination. Unanimous approval was given from the Bradenton City Council with the preparation of construction documents and permitting drawings.		
d.		
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input type="checkbox"/> Check if project performed with current firm.		
e.		
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input type="checkbox"/> Check if project performed with current firm		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person)

12. NAME Joe Brinson, PWS	13. ROLE IN THIS CONTRACT Environmental Services	14. YEARS EXPERIENCE	
		a. TOTAL 27	b. WITH CURRENT FIRM 2

15. FIRM NAME AND LOCATION (City and State) ECS Florida, LLC (Jacksonville, FL)
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16. EDUCATION (Degree and Specialization) BS, Forest Resource Management/Forest Biometrics, University of Georgia, Athens, GA	17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline) Professional Wetland Scientist
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18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)

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

19. RELEVANT PROJECTS

	(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION (if applicable)
a.	TOWN CENTER BOULEVARD PROPERTY, CITY OF PALM COAST, FL	2023	N/A
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Project Manager, ECS completed an ecological study with the purpose to evaluate the site for the occurrence and/or potential occurrence of jurisdictional wetlands and/or protected wildlife species and their habitats.			☒ Check if project performed with current firm.
b.	DIX ELLIS TRAIL, JACKSONVILLE, FL	2023	N/A
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Project Manager, ECS completed a preliminary wetlands delineation study to evaluate jurisdictional wetlands and/or protected wildlife species and their habitats.			☒ Check if project performed with current firm.
c.	BEAUTYREST AVENUE PROPERTY, JACKSONVILLE, FL	2022	N/A
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Project Manager, ECS completed an Ecological Due Diligence with Cultural Resource Assessment Report (CRAS). The purpose of the field visit was to evaluate the site for the occurrence and/or potential occurrence of jurisdictional wetlands and/or protected wildlife species and their habitats.			☒ Check if project performed with current firm.
d.	FIRST COAST EXPRESSWAY PROPERTY, MIDDLEBURG, FL	2021	N/A
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Project Manager, ECS completed a preliminary wetlands delineation and preliminary threatened and endangered species survey. The purpose of the field visit was to evaluate the site for the occurrence and/or potential for occurrence of jurisdictional wetlands and/or protected wildlife species and their habitats.			☒ Check if project performed with current firm.
e.	BAINBRIDGE NOCATEE PARKWAY PROJECT, JACKSONVILLE, FL	2021	N/A
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Project Manager, ECS completed a preliminary wetlands delineation and preliminary threatened and endangered species survey. The purpose of the field visit was to evaluate the site for the occurrence and/or potential occurrence of jurisdictional wetlands and/or protected wildlife species and/or habitat on the site and its relevant surroundings.			☒ Check if project performed with current firm.

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

12. NAME Brett H. Harbison, PE	13. ROLE IN THIS CONTRACT Geotechnical Services	14. YEARS EXPERIENCE	
		a. TOTAL 16	b. WITH CURRENT FIRM 5

15. FIRM NAME AND LOCATION (City and State)
Meskel & Associates Engineering, PLLC (Jacksonville, FL)

16. EDUCATION (Degree and Specialization) BS, Civil Engineering, Florida State University (FSU) Graduate Courses, University of Central Florida	17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline) Professional Engineer, Florida (74679) Professional Engineer, Georgia (PE037919)
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18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)

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

19. RELEVANT PROJECTS

	(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION (If applicable)
a.	MONCRIEF PEDESTRIAN BRIDGE SPAN REPLACEMENT, JACKSONVILLE, FL	2022	
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm. Senior Engineer responsible for the geotechnical exploration, laboratory testing, and engineering analysis for the pedestrian bridge. The main span and extended ramps will be supported on 54-inch non-redundant drilled shafts. The existing bridge was approximately 70-75 feet long, the replacement bridge will be about the same.		
b.	FDOT DISTRICT 2, I-95 NASSAU RIVER BRIDGE IMPROVEMENTS, DUVAL/NASSAU COUNT LINE, FL	2021	
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm. Foundation/Geotechnical Engineer of Record/Project Manager responsible for field coordination, laboratory shear strength testing, rock core strength testing, and geotechnical analysis to support design and construction of non-redundant drilled shafts to support crutch bents proposed for the existing I-95 north and southbound bridges. Brett directed field crews and staff in performing 24 Standard Penetration Tests (SPT) borings in tidally inundated project area using amphibious and sound barge platforms. Borings were advanced to depths of 125 feet below the river mudline. Static axial shaft capacities were estimated to determine anticipated shaft tip elevations. Engineering reports were prepared including drilled shaft analysis, soil parameter recommendations for lateral analysis, and shaft installation construction recommendations.		
c.	CITY OF JACKSONVILLE (COJ) NORTHBANK BULKHEAD REPLACEMENT, JACKSONVILLE, FL	2020	
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm. Geotechnical Engineer responsible for coordinating the geotechnical exploration to replace the existing bulkhead along the northern bank of the St. Johns River in downtown Jacksonville extending between the Fuller Warren Bridge and Liberty Street. The project included constructing a new bulkhead wall in front of the existing bulkhead and installing anchors thru the existing bulkhead. Scope of Work included land and waterside SPT borings, rock coring, laboratory testing, and engineering analysis for the design and construction of the new bulkhead and anchors.		
d.	CITY OF JACKSONVILLE SIDEWALKS AND PEDESTRIAN IMPROVEMENTS, JACKSONVILLE, FL	2020	
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm. Geotechnical Project Manager, services for projects under this contract consist of geotechnical exploration and engineering analysis for tasks such as new sidewalks, drainage improvements, culvert extensions and replacement, and retaining walls. The geotechnical exploration included mobilizing our truck-mounted drill rig to city roads and highways. Following subsurface exploration, laboratory testing, and geotechnical engineering analysis, we provided geotechnical recommendations and site preparation recommendations. These recommendations included clearing and stripping, temporary groundwater control, soil parameters for culver design, excavation protection, and structural backfill for compaction of structural backfill.		
e.	LONNIE MILLER SR. REGIONAL PARK STRUCTURES & PEDESTRIAN TRAIL, JACKSONVILLE, FL	2018	
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm. Geotechnical Engineer for park improvements proposed to include multiple new courts, multi-use fields, playgrounds, pavilions, new parking areas, elevated boardwalks, restroom, and concession facilities, 2-story concrete scorer's building and 2,700 LF of asphalt surfaced pedestrian trail. Geotechnical explorations were performed. Reporting was presented with design recommendations for shallow foundations, groundwater control and underdrain recommendations for field areas along with construction of asphalt pavement base and structural courses for the trail system. Site preparation and earthwork recommendations included clearing and stripping, removal and replacement of deleterious soils/debris encountered, temporary groundwater control, and placement/compaction of fill and backfill soils.		

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 <i>(City and State)</i>		22. YEAR COMPLETED	
Shadow Crest at Rolling Hills Community Development District (Phases 3B & 3C), Green Cove Springs, FL		PROFESSIONAL SERVICES 2023	CONSTRUCTION <i>(If applicable)</i> 2023

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Rolling Hills CDD	b. POINT OF CONTACT NAME Marilee Giles	c. POINT OF CONTACT TELEPHONE NUMBER (904) 940-5850 x 412
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

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

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

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



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

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

F. 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)*

Reverie at Palm Coast

22. YEAR COMPLETED

PROFESSIONAL SERVICES
2022

CONSTRUCTION *(If applicable)*
N/A

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER

Sunbelt Land Management

b. POINT OF CONTACT NAME

Ken Belshe

c. POINT OF CONTACT TELEPHONE NUMBER

(386) 986-2411

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

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



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

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

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)*

Westside Sewer Improvements, Phase 1, City of Bunnell, FL

22. YEAR COMPLETED

PROFESSIONAL SERVICES
2020

CONSTRUCTION *(If applicable)*
2020

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER

City of Bunnell

b. POINT OF CONTACT NAME

Dustin Vost, Infrastructure Director

c. POINT OF CONTACT TELEPHONE NUMBER

(386) 437-7515

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

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



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

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

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)*

City of Bunnell Slip Lining Rehabilitation, Bunnell, FL

22. YEAR COMPLETED

PROFESSIONAL SERVICES
2020

CONSTRUCTION *(If applicable)*
2020

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER

City of Bunnell, FL

b. POINT OF CONTACT NAME

Dustin Vost, Infrastructure Director

c. POINT OF CONTACT TELEPHONE NUMBER

(386) 437-7515

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

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



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

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

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)*

Sweetgrass Apartments, Ph. 1, Enhanced Landscape, St. Mary's, Georgia

22. YEAR COMPLETED

PROFESSIONAL SERVICES
2023

CONSTRUCTION *(If applicable)*
N/A

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER

Sweetgrass Acquisition, LLC

b. POINT OF CONTACT NAME

Ron Buckley

c. POINT OF CONTACT TELEPHONE NUMBER

(904) 247-5334

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

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



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

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

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT
(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER
6

21. TITLE AND LOCATION <i>(City and State)</i> Trout Creek Community Development District, St. Johns County, FL	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES 2023	CONSTRUCTION <i>(If applicable)</i> N/A

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Trout Creek Community Development District	b. POINT OF CONTACT NAME Melissa Dobbins	c. POINT OF CONTACT TELEPHONE NUMBER (904) 436-6270
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

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



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

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

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

(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)*

Tapestry Westland Village, Duval County, Florida

22. YEAR COMPLETED

PROFESSIONAL SERVICES
2019

CONSTRUCTION *(If applicable)*
N/A

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER

Arlington Properties

b. POINT OF CONTACT NAME

Trey Barnes

c. POINT OF CONTACT TELEPHONE NUMBER

(205) 397-6834

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

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

Borings: 16 SPT, 16 Hand Augers

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

Samples: 223



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

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

H. ADDITIONAL INFORMATION

FIRM LICENSURE AND PREQUALIFICATIONS

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

FIRM LICENSURE AND PREQUALIFICATIONS

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

OTSR

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

I. AUTHORIZED REPRESENTATIVE

The foregoing is a statement of facts.

31. SIGNATURE

32. DATE

September 6, 2024

33. NAME AND TITLE

Curt Wimpée, PE / VP Southeast Region

H. ADDITIONAL INFORMATION

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

ABILITY AND ADEQUACY OF PROFESSIONAL PERSONNEL

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

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

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

- **Project Manager** – Responsible for building project teams tailored to meet project goals, provide ongoing project oversight, and be the primary point of contact for the district. **David R. Landing, PE** was selected to be Project Manager because in addition to having 27 years in the industry, he understands how to make CDD projects successful. As Project Manager, David will be handling the district meetings and managing the construction/engineering services.
- **Discipline Lead** – Responsible for identifying team members for individual work orders and ensuring uniformity in format and standards between projects. This individual is also an expert technical resource for project teams. These individuals are identified in the resumes in Section E of the SF330 Form.
- **Quality Manager** – Responsible for ensuring all team members are trained in the Alliant Quality Management Process and verifying that quality processes are followed on individual projects. **Curt Wimpée, PE**, will be our Quality Manager.

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

Additionally, as part of our program for similar clients, we have developed an internal Quality Management Plan (QMP) that defines how our team will provide quality in delivering services to the district. As Project Manager, David will work with Curt Wimpée to ensure that the process is followed for every major deliverable and milestone.

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



Project Manager

David R. Landing, PE



Curtis Wimpée, PE

Quality Manager

H. ADDITIONAL INFORMATION
CERTIFIED MBE

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

WILLINGNESS AND ABILITY TO MEET TIME & BUDGET REQUIREMENTS

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

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

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

Communication with the District

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

Design Review

Design review meetings will be face-to-face meetings to go over review comments at major milestones during the project. The appropriate deliverables will be submitted for District review. A meeting will be scheduled after the District's review period to go over comments. As discussed in our QMP, every comment will be included in a comment response memo and the required action will be documented.

OTSR

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

Progress Meetings

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

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

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


COLLABORATION

EXCELLENCE

INTEGRITY

H. ADDITIONAL INFORMATION

RECENT, CURRENT, AND PROJECTED WORKLOADS

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

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

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

CONSULTANT’S PAST EXPERIENCE & PERFORMANCE

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

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

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

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

Exhibit 2. Projected Schedule

Staff	20%				40%				60%				80%				100%			
Project Manager	■				■				■				■				■			
Senior Engineer/Quality Assurance	■				■				■				■				■			
Water Resources	■				■				■				■				■			
Professional Land Surveyor	■				■				■				■				■			
Roadway Design	■				■				■				■				■			
Construction and Inspection	■				■				■				■				■			
Contract Administration	■				■				■				■				■			

● Percent Committed, ● CDD, ● Excess Availability

H. ADDITIONAL INFORMATION

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

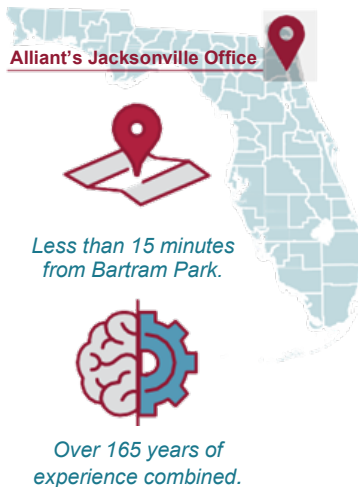
In 2020, Alliant was selected to provide professional engineering services to the City of Atlantic Beach, FL. Alliant worked with the Public Works Director to evaluate their existing maintenance building and provided recommendations and associated costs to the City Commission for either repair or replacement.

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

In 2024, Alliant was selected for the Ridgewood Trails, OTC, and the Trails Community Development Districts. Alliant is thrilled to facilitate expansion of our clients into the Community Development Districts.

GEOGRAPHIC LOCATION

Alliant’s office is located on the southside of Jacksonville, FL in Duval County. We are readily available to serve the needs of the Bartram Park CDD. Office location is important during permitting and construction to ensure timely responses.



VOLUME OF WORK PREVIOUSLY AWARDED TO CONSULTANT BY DISTRICT

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

TECHNICAL EXPERIENCE

In addition to the requested services in the RFQ, Alliant also provides the following services:

Land Planning

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

Our Land Planning Services Include:

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

Landscape Architecture

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

Our Landscape Architecture Services Include:

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

H. ADDITIONAL INFORMATION

Construction Administration



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

Construction Administration Services

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

Graphic Design

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

Graphic Design Services

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

Traffic

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

Traffic Services

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

REFERENCES

Flagler Beach

Dave Taylor

☎ (386) 986-7158

✉ dtaylor@cityof
flaglerbeach.com

City of Palm Coast

Stephen Flanagan

☎ (386) 986-2354

✉ SFlanagan@palmcoastgov.com

City of Atlantic Beach

Scott Williams

☎ (904) 247-5834

✉ swilliams@coab.us

City of Bloomington, MN

Kirk Roberts

☎ (952) 563-4914

✉ roberts@bloomingtonmn.gov

H. ADDITIONAL INFORMATION
FIRM LICENSURE AND PREQUALIFICATIONS

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I. AUTHORIZED REPRESENTATIVE

The foregoing is a statement of facts.

31. SIGNATURE

32. DATE

September 6, 2024

33. NAME AND TITLE

Curt Wimpée, PE / VP Southeast Region

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 ECS Florida, LLC – Tampa			3. YEAR ESTABLISHED 2012	4. UNIQUE ENTITY IDENTIFIER MNVJKQ85HFG3
2b. STREET 4524 N. 56 th Street			5. OWNERSHIP	
2c. CITY Tampa			2d. STATE Florida	2e. ZIP CODE 33610
6a. POINT OF CONTACT NAME AND TITLE Rey Ruiz, PE, SI – Branch Manager			a. TYPE Limited Liability Company	
6b. TELEPHONE NUMBER (813) 302-1644			b. SMALL BUSINESS STATUS N/A	
6c. EMAIL ADDRESS RRuiz1@ecslimited.com			7. NAME OF FIRM (If Block 2a is a Branch Office) ECS Florida, LLC	
8a. FORMER FIRM NAME(S) (if any)			8b. YEAR ESTABLISHED	8c. UNIQUE ENTITY IDENTIFIER

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

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

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

a. SIGNATURE Rey Ruiz, PE, SI – Branch Manager	b. DATE
---	---------

c. NAME AND TITLE

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 ECS Florida, LLC – Jacksonville			3. YEAR ESTABLISHED 2017	4. UNIQUE ENTITY IDENTIFIER MNVJKQ85HFG3
2b. STREET 11554 Davis Creek Court			5. OWNERSHIP	
2c. CITY Jacksonville			2d. STATE Florida	2e. ZIP CODE 32256
6a. POINT OF CONTACT NAME AND TITLE Rey Ruiz, PE, SI – Branch Manager			a. TYPE Limited Liability Company	
6b. TELEPHONE NUMBER (904) 880-0960			b. SMALL BUSINESS STATUS N/A	
6c. EMAIL ADDRESS JBroussard@ecslimited.com			7. NAME OF FIRM (If Block 2a is a Branch Office) ECS Florida, LLC	

8a. FORMER FIRM NAME(S) (If any)	8b. YEAR ESTABLISHED	8c. UNIQUE ENTITY IDENTIFIER
----------------------------------	----------------------	------------------------------

9. EMPLOYEES BY DISCIPLINE				10. PROFILE OF FIRM'S EXPERIENCE AND ANNUAL AVERAGE REVENUE FOR LAST 5 YEARS		
a. Function Code	b. Discipline	c. Number of Employees		a. Profile Code	b. Experience	c. Revenue Index Number (see below)
		(1) FIRM	(2) BRANCH			
02	Administrative	33	6	H11	Housing (Residential, Multi-Family, Apts., Condos)	8
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	Construction Materials Manager	10	3	T02	Testing & Inspection Services	6
	Drillers	29	10	C10	Commercial Buildings (low rise), Shopping Centers	6
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	Field Technicians	94	17	H10	Hotels, Motels	4
30	Geologist	6	2	O01	Office Buildings, Industrial Parks	4
	Hydrologist			101	Industrial Buildings, Manufacturing Plants	4
36	Industrial Hygiene			E02	Schools & Universities	4
	Lab Technician	14	4	A06	Airports, Terminals & Hangers, Freight Handling	4
	Professional Engineer	25	6	H09	Hospitals & Medical Facilities	4
48	Project Manager	59	25	P02	Petroleum & Fuel (Storage & Distribution)	3
	Soils Engineer			R02	Recreation Facilities (Parks, Marinas, Etc.)	3
				D07	Dining Halls, Clubs, Restaurants	3
				E12	Environmental Remediation	3
				S13	Stormwater Handling & Facilities	3
				H06	Highrise, Air-Rights-Type Buildings	3
				W03	Water Supply, Treatment & Distribution	3
Total		294	77			

11. ANNUAL AVERAGE PROFESSIONAL SERVICES REVENUES OF FIRM FOR LAST 3 YEARS (Insert revenue index number shown at right)		PROFESSIONAL SERVICES REVENUE INDEX NUMBER			
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c. Total Work	9	3. \$250,000 to less than \$500,000	8. \$10 million to less than \$25 million	9. \$25 million to less than \$50 million	10. \$50 million or greater
		4. \$500,000 to less than \$1 million	9. \$25 million to less than \$50 million		
		5. \$1 million to less than \$2 million	10. \$50 million or greater		

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

a. SIGNATURE Joey Broussard, PE – Subsidiary Regional Vice President	b. DATE
---	---------

c. NAME AND TITLE

APPENDIX A

Licenses and Certifications



Ron DeSantis, Governor

Melanie S. Griffin, Secretary



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

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

LANDING, DAVID REED

3072 GOLDEN POND BLVD
ORANGE PARK FL 32073

LICENSE NUMBER: PE80483

EXPIRATION DATE: FEBRUARY 28, 2025

Always verify licenses online at MyFloridaLicense.com



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Ron DeSantis, Governor

Melanie S. Griffin, Secretary



STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

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

WIMPEE, CURTIS MARCEL

11410 WILDECROFT TERRACE
JACKSONVILLE FL 32223

LICENSE NUMBER: PE79764

EXPIRATION DATE: FEBRUARY 28, 2025

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Ron DeSantis, Governor

Melanie S. Griffin, Secretary



STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

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

SCHOFIELD, JOSEPH RYAN

10475 FORTUNE PKWY.
SUITE 101
JACKSONVILLE FL 32256

LICENSE NUMBER: PE69219

EXPIRATION DATE: FEBRUARY 28, 2025

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Ron DeSantis, Governor

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

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

OESTMAN, ADAM VIKTOR

12844 BEAUBIEN RD
JACKSONVILLE FL 32258

LICENSE NUMBER: PE98440

EXPIRATION DATE: FEBRUARY 28, 2025

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State of Florida

Woman Business Certification

Meskel & Associates Engineering, PLLC

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

05/04/2023 to 05/04/2025



J. Todd Inman
Florida Department of Management Services

SIXTH ORDER OF BUSINESS



Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

951 Yamato Road • Suite 280
Boca Raton, Florida 33431
(561) 994-9299 • (800) 299-4728
Fax (561) 994-5823
www.graucpa.com

September 9, 2024

Board of Supervisors
Bartram Park Community Development District
475 West Town Place, Suite 114
St. Augustine, FL 32092

We are pleased to confirm our understanding of the services we are to provide Bartram Park Community Development District, City of Jacksonville, Florida ("the District") for the fiscal year ended September 30, 2024. We will audit the financial statements of the governmental activities and each major fund, including the related notes to the financial statements, which collectively comprise the basic financial statements of Bartram Park Community Development District as of and for the fiscal year ended September 30, 2024. In addition, we will examine the District's compliance with the requirements of Section 218.415 Florida Statutes. This letter serves to renew our agreement and establish the terms and fee for the 2024 audit.

Accounting principles generally accepted in the United States of America provide for certain required supplementary information (RSI), such as management's discussion and analysis (MD&A), to supplement the District's basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. As part of our engagement, we will apply certain limited procedures to the District's RSI in accordance with auditing standards generally accepted in the United States of America. These limited procedures will consist of inquiries of management regarding the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We will not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

The following RSI is required by generally accepted accounting principles and will be subjected to certain limited procedures, but will not be audited:

- 1) Management's Discussion and Analysis
- 2) Budgetary comparison schedule

The following other information accompanying the financial statements will not be subjected to the auditing procedures applied in our audit of the financial statements, and our auditor's report will not provide an opinion or any assurance on that information:

- 1) Compliance with FL Statute 218.39 (3) (c)

Audit Objectives

The objective of our audit is the expression of opinions as to whether your financial statements are fairly presented, in all material respects, in conformity with U.S. generally accepted accounting principles and to report on the fairness of the supplementary information referred to in the second paragraph when considered in relation to the financial statements as a whole. Our audit will be conducted in accordance with auditing standards generally accepted in the United States of America and the standards for financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States, and will include tests of the accounting records of the District and other procedures we consider necessary to enable us to express such opinions. We will issue a written report upon completion of our audit of the District's financial statements. We cannot provide assurance that an unmodified opinion will be expressed. Circumstances may arise in which it is necessary for us to modify our opinion or add emphasis-of-matter or other-matter paragraphs. If our opinion on the financial statements is other than unmodified, we will discuss the reasons with you in advance. If, for any reason, we are unable to complete the audit or are unable to form or have not formed an opinion, we may decline to express an opinion or issue a report, or may withdraw from this engagement.

We will also provide a report (that does not include an opinion) on internal control related to the financial statements and compliance with the provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a material effect on the financial statements as required by *Government Auditing Standards*. The report on internal control and on compliance and other matters will include a paragraph that states (1) that the purpose of the report is solely to describe the scope of testing of internal control and compliance, and the results of that testing, and not to provide an opinion on the effectiveness of the District's internal control on compliance, and (2) that the report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the District's internal control and compliance. The paragraph will also state that the report is not suitable for any other purpose. If during our audit we become aware that the District is subject to an audit requirement that is not encompassed in the terms of this engagement, we will communicate to management and those charged with governance that an audit in accordance with U.S. generally accepted auditing standards and the standards for financial audits contained in *Government Auditing Standards* may not satisfy the relevant legal, regulatory, or contractual requirements.

Examination Objective

The objective of our examination is the expression of an opinion as to whether the District is in compliance with Florida Statute 218.415 in accordance with Rule 10.556(10) of the Auditor General of the State of Florida. Our examination will be conducted in accordance with attestation standards established by the American Institute of Certified Public Accountants and will include tests of your records and other procedures we consider necessary to enable us to express such an opinion. We will issue a written report upon completion of our examination of the District's compliance. The report will include a statement that the report is intended solely for the information and use of management, those charged with governance, and the Florida Auditor General, and is not intended to be and should not be used by anyone other than these specified parties. We cannot provide assurance that an unmodified opinion will be expressed. Circumstances may arise in which it is necessary for us to modify our opinion or add emphasis-of-matter or other-matter paragraphs. If our opinion on the District's compliance is other than unmodified, we will discuss the reasons with you in advance. If, for any reason, we are unable to complete the examination or are unable to form or have not formed an opinion, we may decline to express an opinion or issue a report, or may withdraw from this engagement.

Other Services

We will assist in preparing the financial statements and related notes of the District in conformity with U.S. generally accepted accounting principles based on information provided by you. These nonaudit services do not constitute an audit under *Government Auditing Standards* and such services will not be conducted in accordance with *Government Auditing Standards*. The other services are limited to the financial statement services previously defined. We, in our sole professional judgment, reserve the right to refuse to perform any procedure or take any action that could be construed as assuming management responsibilities.

Management Responsibilities

Management is responsible for compliance with Florida Statute 218.415 and will provide us with the information required for the examination. The accuracy and completeness of such information is also management's responsibility. You agree to assume all management responsibilities relating to the financial statements and related notes and any other nonaudit services we provide. You will be required to acknowledge in the management representation letter our assistance with preparation of the financial statements and related notes and that you have reviewed and approved the financial statements and related notes prior to their issuance and have accepted responsibility for them. In addition, you will be required to make certain representations regarding compliance with Florida Statute 218.415 in the management representation letter. Further, you agree to oversee the nonaudit services by designating an individual, preferably from senior management, who possesses suitable skill, knowledge, or experience; evaluate the adequacy and results of those services; and accept responsibility for them.

Management is responsible for designing, implementing and maintaining effective internal controls, including evaluating and monitoring ongoing activities, to help ensure that appropriate goals and objectives are met; following laws and regulations; and ensuring that management and financial information is reliable and properly reported. Management is also responsible for implementing systems designed to achieve compliance with applicable laws, regulations, contracts, and grant agreements. You are also responsible for the selection and application of accounting principles, for the preparation and fair presentation of the financial statements and all accompanying information in conformity with U.S. generally accepted accounting principles, and for compliance with applicable laws and regulations and the provisions of contracts and grant agreements.

Management is also responsible for making all financial records and related information available to us and for the accuracy and completeness of that information. You are also responsible for providing us with (1) access to all information of which you are aware that is relevant to the preparation and fair presentation of the financial statements, (2) additional information that we may request for the purpose of the audit, and (3) unrestricted access to persons within the government from whom we determine it necessary to obtain audit evidence.

Your responsibilities include adjusting the financial statements to correct material misstatements and for confirming to us in the written representation letter that the effects of any uncorrected misstatements aggregated by us during the current engagement and pertaining to the latest period presented are immaterial, both individually and in the aggregate, to the financial statements taken as a whole.

You are responsible for the design and implementation of programs and controls to prevent and detect fraud, and for informing us about all known or suspected fraud affecting the government involving (1) management, (2) employees who have significant roles in internal control, and (3) others where the fraud could have a material effect on the financial statements. Your responsibilities include informing us of your knowledge of any allegations of fraud or suspected fraud affecting the government received in communications from employees, former employees, grantors, regulators, or others. In addition, you are responsible for identifying and ensuring that the government complies with applicable laws, regulations, contracts, agreements, and grants and for taking timely and appropriate steps to remedy fraud and noncompliance with provisions of laws, regulations, contracts or grant agreements, or abuse that we report.

Management is responsible for establishing and maintaining a process for tracking the status of audit findings and recommendations. Management is also responsible for identifying and providing report copies of previous financial audits, attestation engagements, performance audits or other studies related to the objectives discussed in the Audit Objectives section of this letter. This responsibility includes relaying to us corrective actions taken to address significant findings and recommendations resulting from those audits, attestation engagements, performance audits, or other studies. You are also responsible for providing management's views on our current findings, conclusions, and recommendations, as well as your planned corrective actions, for the report, and for the timing and format for providing that information.

With regard to the electronic dissemination of audited financial statements, including financial statements published electronically on your website, you understand that electronic sites are a means to distribute information and, therefore, we are not required to read the information contained in these sites or to consider the consistency of other information in the electronic site with the original document.

Audit Procedures—General

An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements; therefore, our audit will involve judgment about the number of transactions to be examined and the areas to be tested. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements. We will plan and perform the audit to obtain reasonable rather than absolute assurance about whether the financial statements are free of material misstatement, whether from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to the government or to acts by management or employees acting on behalf of the government. Because the determination of abuse is subjective, *Government Auditing Standards* do not expect auditors to provide reasonable assurance of detecting abuse.

Because of the inherent limitations of an audit, combined with the inherent limitations of internal control, and because we will not perform a detailed examination of all transactions, there is a risk that material misstatements may exist and not be detected by us, even though the audit is properly planned and performed in accordance with U.S. generally accepted auditing standards and *Government Auditing Standards*. In addition, an audit is not designed to detect immaterial misstatements or violations of laws or governmental regulations that do not have a direct and material effect on the financial statements. Our responsibility as auditors is limited to the period covered by our audit and does not extend to later periods for which we are not engaged as auditors.

Our procedures will include tests of documentary evidence supporting the transactions recorded in the accounts, and may include tests of the physical existence of inventories, and direct confirmation of receivables and certain other assets and liabilities by correspondence with selected individuals, funding sources, creditors, and financial institutions. We will request written representations from your attorneys as part of the engagement, and they may bill you for responding to this inquiry. At the conclusion of our audit, we will require certain written representations from you about your responsibilities for the financial statements; compliance with laws, regulations, contracts, and grant agreements; and other responsibilities required by generally accepted auditing standards.

Audit Procedures—Internal Control

Our audit will include obtaining an understanding of the government and its environment, including internal control, sufficient to assess the risks of material misstatement of the financial statements and to design the nature, timing, and extent of further audit procedures. Tests of controls may be performed to test the effectiveness of certain controls that we consider relevant to preventing and detecting errors and fraud that are material to the financial statements and to preventing and detecting misstatements resulting from illegal acts and other noncompliance matters that have a direct and material effect on the financial statements. Our tests, if performed, will be less in scope than would be necessary to render an opinion on internal control and, accordingly, no opinion will be expressed in our report on internal control issued pursuant to *Government Auditing Standards*.

An audit is not designed to provide assurance on internal control or to identify significant deficiencies or material weaknesses. However, during the audit, we will communicate to management and those charged with governance internal control related matters that are required to be communicated under AICPA professional standards and *Government Auditing Standards*.

Audit Procedures—Compliance

As part of obtaining reasonable assurance about whether the financial statements are free of material misstatement, we will perform tests of the District's compliance with the provisions of applicable laws, regulations, contracts, agreements, and grants. However, the objective of our audit will not be to provide an opinion on overall compliance and we will not express such an opinion in our report on compliance issued pursuant to *Government Auditing Standards*.

Engagement Administration, Fees, and Other

We understand that your employees will prepare all cash or other confirmations we request and will locate any documents selected by us for testing.

The audit documentation for this engagement is the property of Grau & Associates and constitutes confidential information. However, subject to applicable laws and regulations, audit documentation and appropriate individuals will be made available upon request and in a timely manner to a cognizant or oversight agency or its designee, a federal agency providing direct or indirect funding, or the U.S. Government Accountability Office for purposes of a quality review of the audit, to resolve audit findings, or to carry out oversight responsibilities. We will notify you of any such request. If requested, access to such audit documentation will be provided under the supervision of Grau & Associates personnel. Furthermore, upon request, we may provide copies of selected audit documentation to the aforementioned parties. These parties may intend, or decide, to distribute the copies or information contained therein to others, including other governmental agencies. Notwithstanding the foregoing, the parties acknowledge that various documents reviewed or produced during the conduct of the audit may be public records under Florida law. The District agrees to notify Grau & Associates of any public record request it receives that involves audit documentation.

Furthermore, Grau & Associates agrees to comply with all applicable provisions of Florida law in handling such records, including but not limited to Section 119.0701, Florida Statutes. Auditor acknowledges that the designated public records custodian for the District is the District Manager ("Public Records Custodian"). Among other requirements and to the extent applicable by law, Grau & Associates shall 1) keep and maintain public records required by the District to perform the service; 2) upon request by the Public Records Custodian, provide the District with the requested public records or allow the records to be inspected or copied within a reasonable time period at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes; 3) ensure that public records which are exempt or confidential, and exempt from public records disclosure requirements, are not disclosed except as authorized by law for the duration of the contract term and following the contract term if Auditor does not transfer the records to the Public Records Custodian of the District; and 4) upon completion of the contract, transfer to the District, at no cost, all public records in Grau & Associate's possession or, alternatively, keep, maintain and meet all applicable requirements for retaining public records pursuant to Florida laws. When such public records are transferred by Grau & Associates, Grau & Associates shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. All records stored electronically must be provided to the District in a format that is compatible with Microsoft Word or Adobe PDF formats.

IF GRAU & ASSOCIATES HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO ITS DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONTACT THE PUBLIC RECORDS CUSTODIAN AT: GMS-NF LLC - 475 WEST TOWN PLACE, SUITE 114, ST. AUGUSTINE, FL 32092 - TELEPHONE: 904-940-5850

Our fee for these services will not exceed \$3,800 for the September 30, 2024 audit, unless there is a change in activity by the District which results in additional audit work or if additional Bonds are issued.

We will complete the audit within prescribed statutory deadlines, which requires the District to submit its annual audit to the Auditor General no later than nine (9) months after the end of the audited fiscal year, with the understanding that your employees will provide information needed to perform the audit on a timely basis.

All accounting records (including, but not limited to, trial balances, general ledger detail, vendor files, bank and trust statements, minutes, and confirmations) for the fiscal year ended September 30, 2024 must be provided to us no later than January 1, 2025, in order for us to complete the engagement by March 31, 2025.

Subject to timely receipt of the necessary information, we will submit a preliminary draft audit report by March 15, 2025 for the District's review, and a final draft audit report by March 31, 2025 for the District's review and approval.

The audit documentation for this engagement will be retained for a minimum of five years after the report release date. If we are aware that a federal awarding agency or auditee is contesting an audit finding, we will contact the party(ies) contesting the audit finding for guidance prior to destroying the audit documentation.

Our invoices for these fees will be rendered each month as work progresses and are payable on presentation. Invoices will be submitted in sufficient detail to demonstrate compliance with the terms of this agreement. In accordance with our firm policies, work may be suspended if your account becomes 60 days or more overdue and may not be resumed until your account is paid in full. If we elect to terminate our services for nonpayment, our engagement will be deemed to have been completed upon written notification of termination, even if we have not completed our report. You will be obligated to compensate us for all time expended and to reimburse us for all out-of-pocket costs through the date of termination. The above fee is based on anticipated cooperation from your personnel and the assumption that unexpected circumstances will not be encountered during the audit. If significant additional time is necessary, we will discuss it with you and arrive at a new fee estimate.

This agreement may be renewed each year thereafter subject to the mutual agreement by both parties to all terms and fees. The fee for each annual renewal will be agreed upon separately.

The District has the option to terminate this agreement with or without cause by providing thirty (30) days written notice of termination to Grau & Associates. Upon any termination of this agreement, Grau & Associates shall be entitled to payment of all work and/or services rendered up until the effective termination of this agreement, subject to whatever claims or off-sets the District may have against Grau & Associates.

We will provide you with a copy of our most recent external peer review report and any letter of comment, and any subsequent peer review reports and letters of comment received during the period of the contract. Our 2022 peer review report accompanies this letter.

We appreciate the opportunity to be of service to Bartram Park Community Development District and believe this letter accurately summarizes the terms of our engagement and, with any addendum, if applicable, is the complete and exclusive statement of the agreement between Grau & Associates and the District with respect to the terms of the engagement between the parties. If you have any questions, please let us know. If you agree with the terms of our engagement as described in this letter, please sign the enclosed copy and return it to us.

Very truly yours,

Grau & Associates



Antonio J. Grau

RESPONSE:

This letter correctly sets forth the understanding of Bartram Park Community Development District.

By: 

Title: Secretary

Date: 9/10/2024



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



Peer Review
Program

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

March 17, 2023

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

Dear Antonio Grau:

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

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

Thank you for your cooperation.

Sincerely,

FICPA Peer Review Committee

Peer Review Team
FICPA Peer Review Committee

850.224.2727, x5957

cc: Daniel Hevia, Racquel McIntosh

Firm Number: 900004390114

Review Number: 594791

ELEVENTH ORDER OF BUSINESS

A.

Bartram Park
Community Development District

Unaudited Financial Reporting
September 30, 2024



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Bartram Park
Community Development District
Combined Balance Sheet
September 30, 2024

	<i>General Fund</i>	<i>Debt Service Fund</i>	<i>Capital Reserve Fund</i>	<i>Totals Governmental Funds</i>
Assets:				
Cash:				
Operating Account	\$ 84,785	\$ -	\$ 72,078	\$ 156,862
Due from General Fund-2015	-	-	-	-
Due from General Fund-2022	-	-	-	-
Investments:				
State Board of Administration (SBA)	81,641	-	81,373	163,015
Custody US Bank Account	54,554	-	-	54,554
Series 2015A1				
Reserve	-	512,916	-	512,916
Revenue	-	328,583	-	328,583
Interest	-	-	-	-
Sinking	-	-	-	-
Excess Revenue	-	-	-	-
Series 2015A2				
Reserve	-	129,744	-	129,744
Interest	-	-	-	-
Sinking	-	-	-	-
Series 2022				
Reserve	-	52,103	-	52,103
Revenue	-	243,901	-	243,901
Interest	-	123	-	123
Prepayment	-	4	-	4
Sinking	-	525	-	525
Prepaid Expenses	14,443	-	-	14,443
Total Assets	\$ 235,422	\$ 1,267,898	\$ 153,451	\$ 1,656,771
Liabilities:				
Accounts Payable	\$ 602	\$ -	\$ -	\$ 602
Accrued Expenses	-	-	-	-
FICA Payable	-	-	-	-
Due to Debt Service - Series 2015	-	-	-	-
Due to Debt Service - Series 2022	-	-	-	-
Total Liabilities	\$ 602	\$ -	\$ -	\$ 602
Fund Balance:				
Nonspendable:				
Prepaid Items	\$ 14,443	\$ -	\$ -	\$ 14,443
Restricted for:				
Debt Service	-	1,267,898	-	1,267,898
Assigned for:				
Capital Reserve Fund	-	-	153,451	153,451
Unassigned	220,378	-	-	220,378
Total Fund Balances	\$ 234,821	\$ 1,267,898	\$ 153,451	\$ 1,656,170
Total Liabilities & Fund Balance	\$ 235,422	\$ 1,267,898	\$ 153,451	\$ 1,656,771

Bartram Park
Community Development District
General Fund

Statement of Revenues, Expenditures, and Changes in Fund Balance
For The Period Ending September 30, 2024

	Adopted Budget	Prorated Budget Thru 09/30/24	Actual Thru 09/30/24	Variance
Revenues:				
Special Assessments - Tax Roll	\$ 129,495	\$ 129,495	\$ 129,999	\$ 504
Interest	4,000	4,000	7,615	3,615
Total Revenues	\$ 133,495	\$ 133,495	\$ 137,614	\$ 4,118
Expenditures:				
<i>General & Administrative:</i>				
Supervisor Fees	\$ 4,000	\$ 4,000	\$ 3,200	\$ 800
PR-FICA	\$ 306	\$ 306	245	61
Engineering	\$ 8,500	\$ 8,500	193	8,307
Attorney	\$ 20,000	\$ 20,000	2,930	17,070
Annual Audit	\$ 3,700	\$ 3,700	3,700	-
Assessment Administration	\$ 7,950	\$ 7,950	7,950	-
Arbitrage Rebate	\$ 1,200	\$ 1,200	600	600
Trustee Fees	\$ 10,000	\$ 10,000	9,917	83
Management Fees	\$ 47,700	\$ 47,700	47,700	-
Information Technology	\$ 1,625	\$ 1,625	1,625	(0)
Website Maintenance	\$ 1,050	\$ 1,050	1,050	-
Telephone	\$ 191	\$ 191	27	164
Postage & Delivery	\$ 400	\$ 400	215	185
Insurance General Liability/Public Officials	\$ 7,960	\$ 7,960	7,526	434
Printing & Binding	\$ 1,000	\$ 1,000	309	691
Legal Advertising	\$ 800	\$ 800	765	35
Other Current Charges	\$ 500	\$ 500	350	150
Office Supplies	\$ 100	\$ 100	2	98
Dues, Licenses & Subscriptions	\$ 175	\$ 175	175	-
Capital Reserves-Transfer out	\$ 16,339	\$ 16,339	16,339	(0)
Total General & Administrative	\$ 133,495	\$ 133,495	\$ 104,817	\$ 28,678
Total Expenditures	\$ 133,495	\$ 133,495	\$ 104,817	\$ 28,678
Excess (Deficiency) of Revenues over Expenditures	\$ -	\$ -	\$ 32,797	\$ 32,797
Net Change in Fund Balance	\$ -	\$ -	\$ 32,797	\$ 32,797
Fund Balance - Beginning	\$ -		\$ 202,024	
Fund Balance - Ending	\$ -		\$ 234,821	

Bartram Park
Community Development District
Month to Month

	Oct	Nov	Dec	Jan	Feb	March	April	May	June	July	Aug	Sept	Total
Revenues:													
Special Assessments - Tax Roll	\$ -	\$ 109,488	\$ 13,222	\$ 2,394	\$ 937	\$ 1,099	\$ 975	\$ 622	\$ 1,263	\$ -	\$ -	\$ -	\$ 129,999
Interest	526	610	590	608	684	923	952	947	959	334	240	241	7,615
Total Revenues	\$ 526	\$ 110,098	\$ 13,812	\$ 3,003	\$ 1,620	\$ 2,021	\$ 1,927	\$ 1,569	\$ 2,222	\$ 334	\$ 240	\$ 241	\$ 137,614
Expenditures:													
<u>General & Administrative:</u>													
Supervisor Fees	\$ 1,000	\$ -	\$ -	\$ 1,000	\$ -	\$ -	\$ 600	\$ -	\$ -	\$ 600	\$ -	\$ -	\$ 3,200
PR-FICA	77	-	-	77	-	-	46	-	-	46	-	-	245
Engineering	193	-	-	-	-	-	-	-	-	-	-	-	193
Attorney	455	-	193	370	222	539	634	-	44	475	-	-	2,930
Annual Audit	-	-	-	-	-	-	3,700	-	-	-	-	-	3,700
Assessment Administration	7,950	-	-	-	-	-	-	-	-	-	-	-	7,950
Arbitrage Rebate	-	-	-	-	-	-	-	-	-	-	600	-	600
Trustee Fees	5,833	-	-	-	-	2,433	-	-	-	-	1,650	-	9,917
Management Fees	3,975	3,975	3,975	3,975	3,975	3,975	3,975	3,975	3,975	3,975	3,975	3,975	47,700
Information Technology	135	135	135	135	135	135	135	135	135	135	135	135	1,625
Website Maintenance	88	88	88	88	88	88	88	88	88	88	88	88	1,050
Telephone	-	-	9	-	-	6	-	-	3	-	-	9	27
Postage & Delivery	2	7	10	1	7	37	1	72	1	10	14	52	215
Insurance General Liability/Public Officials	7,526	-	-	-	-	-	-	-	-	-	-	-	7,526
Printing & Binding	2	6	26	1	23	31	1	28	-	-	74	117	309
Legal Advertising	80	-	-	-	-	-	80	76	252	-	194	83	765
Other Current Charges	-	-	-	-	-	-	350	-	-	-	-	-	350
Office Supplies	0	0	0	0	0	0	0	0	0	0	0	0	2
Dues, Licenses & Subscriptions	175	-	-	-	-	-	-	-	-	-	-	-	175
Capital Reserves-Transfer out	-	-	-	-	-	-	16,339	-	-	-	-	-	16,339
Total General & Administrative	\$ 27,490	\$ 4,211	\$ 4,435	\$ 5,647	\$ 4,450	\$ 7,245	\$ 25,949	\$ 4,374	\$ 4,498	\$ 5,329	\$ 6,730	\$ 4,459	\$ 104,817
Total Expenditures	\$ 27,490	\$ 4,211	\$ 4,435	\$ 5,647	\$ 4,450	\$ 7,245	\$ 25,949	\$ 4,374	\$ 4,498	\$ 5,329	\$ 6,730	\$ 4,459	\$ 104,817
Excess (Deficiency) of Revenues over Expenditures	\$ (26,965)	\$ 105,887	\$ 9,377	\$ (2,644)	\$ (2,829)	\$ (5,224)	\$ (24,022)	\$ (2,806)	\$ (2,275)	\$ (4,995)	\$ (6,490)	\$ (4,218)	\$ 32,797
Net Change in Fund Balance	\$ (26,965)	\$ 105,887	\$ 9,377	\$ (2,644)	\$ (2,829)	\$ (5,224)	\$ (24,022)	\$ (2,806)	\$ (2,275)	\$ (4,995)	\$ (6,490)	\$ (4,218)	\$ 32,797

Bartram Park
Community Development District
Debt Service Fund Series 2015 A1&A2
Statement of Revenues, Expenditures, and Changes in Fund Balance
For The Period Ending September 30, 2024

	Adopted Budget	Prorated Budget Thru 09/30/24	Actual Thru 09/30/24	Variance
Revenues:				
Special Assessments - Tax Roll	\$ 1,305,910	\$ 1,305,910	\$ 1,310,992	\$ 5,082
Interest Income	4,000	4,000	61,455	57,455
Total Revenues	\$ 1,309,910	\$ 1,309,910	\$ 1,372,446	\$ 62,537
Expenditures:				
Series 2015A-1				
Interest - 11/1	\$ 210,344	\$ 210,344	\$ 210,344	\$ -
Interest - 5/1	210,344	210,344	210,344	-
Principal - 5/1	620,000	620,000	620,000	-
Special Call - 5/1	-	-	55,000	(55,000)
Series 2015A-2				
Interest 11/1	\$ 57,738	57,738	\$ 57,738	\$ -
Interest - 5/1	57,738	57,738	57,738	-
Principal - 5/1	150,000	150,000	150,000	-
Special Call - 5/1	-	-	15,000	(15,000)
Total Expenditures	\$ 1,306,163	\$ 1,306,163	\$ 1,376,163	\$ (70,000)
Excess (Deficiency) of Revenues over Expenditures	\$ 3,747	\$ 3,747	\$ (3,716)	\$ (7,463)
Other Financing Sources/(Uses):				
Transfer In/(Out)	\$ -	\$ -	\$ -	\$ -
Total Other Financing Sources/(Uses)	\$ -	\$ -	\$ -	\$ -
Net Change in Fund Balance	\$ 3,747	\$ 3,747	\$ (3,716)	\$ (7,463)
Fund Balance - Beginning	\$ 325,628		\$ 974,958	
Fund Balance - Ending	\$ 329,376		\$ 971,242	

Bartram Park
Community Development District
Debt Service Fund Series 2022
Statement of Revenues, Expenditures, and Changes in Fund Balance
For The Period Ending September 30, 2024

	Adopted Budget	Prorated Budget Thru 09/30/24	Actual Thru 09/30/24	Variance
Revenues:				
Special Assessments - Tax Roll	\$ 1,042,770	\$ 1,042,770	\$ 1,050,531	\$ 7,761
Interest Income	7,000	7,000	24,327	17,327
Total Revenues	\$ 1,049,770	\$ 1,049,770	\$ 1,074,858	\$ 25,088
Expenditures:				
Interest - 11/1	\$ 168,420	\$ 168,420	\$ 168,420	\$ -
Special Call - 11/1	-	-	5,000	(5,000)
Interest - 5/1	168,420	168,420	168,350	70
Principal - 5/1	715,000	715,000	715,000	-
Total Expenditures	\$ 1,051,840	\$ 1,051,840	\$ 1,056,770	\$ (4,930)
Excess (Deficiency) of Revenues over Expenditures	\$ (2,070)	\$ (2,070)	\$ 18,088	\$ 20,158
Other Financing Sources/(Uses):				
Transfer In/(Out)	\$ -	\$ -	\$ -	\$ -
Total Other Financing Sources/(Uses)	\$ -	\$ -	\$ -	\$ -
Net Change in Fund Balance	\$ (2,070)	\$ (2,070)	\$ 18,088	\$ 20,158
Fund Balance - Beginning	\$ 226,002		\$ 278,568	
Fund Balance - Ending	\$ 223,932		\$ 296,656	

Bartram Park
Community Development District
Capital Reserve Fund
Statement of Revenues, Expenditures, and Changes in Fund Balance
For The Period Ending September 30, 2024

	Adopted Budget	Prorated Budget Thru 09/30/24	Actual Thru 09/30/24	Variance
Revenues				
Capital Reserve Transfer In	\$ 16,339	\$ 16,339	\$ 16,339	\$ 0
Interest	1,200	1,200	2,822	1,622
Total Revenues	\$ 17,539	\$ 17,539	\$ 19,161	\$ 1,623
Expenditures:				
Capital Outlay	\$ -	\$ -	\$ -	\$ -
Repair and Replacements	-	-	-	-
Other Service Charges	400	400	-	400
Total Expenditures	\$ 400	\$ 400	\$ -	\$ 400
Excess (Deficiency) of Revenues over Expenditures	\$ 17,139	\$ 17,139	\$ 19,161	
Other Financing Sources/(Uses)				
Transfer In/(Out)	\$ -	\$ -	\$ -	\$ -
Total Other Financing Sources (Uses)	\$ -	\$ -	\$ -	\$ -
Net Change in Fund Balance	\$ 17,139		\$ 19,161	
Fund Balance - Beginning	\$ 62,159		\$ 134,290	
Fund Balance - Ending	\$ 79,297		\$ 153,451	

Bartram Park
Community Development District
Long Term Debt Report

Series 2015-A1 Refunding Bonds	
Interest Rate:	1.0%-4.65%
Maturity Date:	5/1/2035
Reserve Fund Definition	50% of Maximum Annual Debt Service
Reserve Fund Requirement	\$512,916
Reserve Fund Balance	\$512,916
Bonds outstanding - 11/30/2020	\$11,435,000
Less: May 1, 2021	(\$570,000)
Less: May 1, 2021 (Prepayment)	(\$80,000)
Less: May 1, 2022	(\$580,000)
Less: May 1, 2022 (Prepayment)	(\$5,000)
Less: May 1, 2023	(\$600,000)
Less: May 1, 2023 (Prepayment)	(\$20,000)
Less: May 1, 2024	(\$620,000)
Less: May 1, 2024 (Prepayment)	(\$55,000)
Current Bonds Outstanding	\$8,905,000

Series 2015-A2 Refunding Bonds	
Interest Rate:	4.0%-5%
Maturity Date:	5/1/2035
Reserve Fund Definition	50% of Maximum Annual Debt Service
Reserve Fund Requirement	\$129,744
Reserve Fund Balance	\$129,744
Bonds outstanding - 11/30/2020	\$2,785,000
Less: May 1, 2021	(\$135,000)
Less: May 1, 2021 (Prepayment)	(\$20,000)
Less: May 1, 2022	(\$135,000)
Less: May 1, 2022 (Prepayment)	(\$5,000)
Less: May 1, 2023	(\$145,000)
Less: May 1, 2023 (Prepayment)	(\$5,000)
Less: May 1, 2024	(\$150,000)
Less: May 1, 2024 (Prepayment)	(\$15,000)
Current Bonds Outstanding	\$2,175,000

Series 2022 Revenue Refunding Note	
Interest Rate:	2.80%
Maturity Date:	5/1/2037
Reserve Fund Definition	5% of Maximum Annual Debt Service
Reserve Fund Requirement	\$52,103
Reserve Fund Balance	\$52,103
Bonds outstanding - 3/15/22	\$12,730,000
Less: November 1, 2022	(\$5,000)
Less: May 1, 2023	(\$695,000)
Less: November 1, 2023	(\$5,000)
Less: May 1, 2024	(\$715,000)
Current Bonds Outstanding	\$11,310,000
Total Bonds Outstanding	\$22,390,000

B.

BARTRAM PARK COMMUNITY DEVELOPMENT DISTRICT
Fiscal Year 2024 Summary of Assessment Receipts

ASSESSED	UNITS	SERIES 2005 / 2015A1-2 ASSESSED DEBT	SERIES 2022-1 ASSESSED DEBT	SERIES 2022-3 ASSESSED DEBT	SERIES 2022-4 ASSESSED DEBT	SERIES 2022-5 ASSESSED DEBT	TOTAL SERIES 2022	O&M ASSESSED	TOTAL ASSESSED
TOTAL NET TAX ROLL ASSESSED NET	4,148	1,305,909.89	311,465.71	305,570.95	208,665.60	220,756.63	1,046,458.89	129,495.38	2,481,864.16

SUMMARY TAX ROLL COLLECTIONS - SERIES 2015/2022									
DUVAL COUNTY DISTRIBUTION	DATE	SERIES 2015 DEBT RECEIVED	SERIES 2022-1 DEBT RECEIVED	SERIES 2022-3 DEBT RECEIVED	SERIES 2022-4 DEBT RECEIVED	SERIES 2022-5 DEBT RECEIVED	TOTAL SERIES 2022 RECEIVED	O&M RECEIVED	TOTAL TAX ROLL RECEIPTS
1	11/3/2023	10,511.47	2,507.04	2,459.59	1,679.58	1,776.90	8,423.11	1,042.33	19,976.91
2	11/14/2023	40,017.17	9,544.28	9,363.65	6,394.17	6,764.67	32,066.78	3,968.14	76,052.09
3	11/21/2023	52,974.80	12,634.74	12,395.62	8,464.61	8,955.09	42,450.06	5,253.04	100,677.89
4	11/28/2023	110,852.78	26,438.91	25,938.54	17,712.68	18,739.03	88,829.16	10,992.28	210,674.22
5	11/30/2023	889,786.59	212,218.33	208,201.91	142,175.09	150,413.36	713,008.68	88,232.16	1,691,027.43
6	12/6/2023	103,130.91	24,597.21	24,131.69	16,478.83	17,433.69	82,641.43	10,226.57	195,998.90
7	12/14/2023	24,932.83	5,946.60	5,834.05	3,983.91	4,214.75	19,979.31	2,472.36	47,384.50
8	12/22/2023	5,277.57	1,258.73	1,234.90	843.28	892.14	4,229.06	523.33	10,029.96
9	01/9/2024	16,671.38	3,976.20	3,900.95	2,663.85	2,818.20	13,359.20	1,653.15	31,683.74
10	01/19/2024	7,475.52	1,782.95	1,749.20	1,194.48	1,263.69	5,990.32	741.28	14,207.12
11	02/5/2024	5,688.67	1,356.78	1,331.10	908.97	961.64	4,558.48	564.09	10,811.25
12	02/20/2024	3,756.61	895.97	879.01	600.25	635.03	3,010.27	372.51	7,139.39
13	03/6/2024	4,361.49	1,040.24	1,020.55	696.90	737.29	3,494.98	432.49	8,288.96
14	03/20/2024	6,717.66	1,602.19	1,571.87	1,073.39	1,135.58	5,383.04	666.13	12,766.83
15	04/5/2024	7,219.08	1,721.78	1,689.20	1,153.50	1,220.34	5,784.83	715.85	13,719.76
16	04/18/2024	2,610.02	622.50	610.72	417.04	441.21	2,091.47	258.81	4,960.30
17	05/3/2024	4,871.68	1,161.92	1,139.93	778.42	823.53	3,903.80	483.08	9,258.57
18	05/20/2024	1,396.21	333.00	326.70	223.09	236.02	1,118.82	138.45	2,653.48
19	06/6/2024	698.11	166.50	163.35	111.55	118.01	559.41	69.22	1,326.74
TAX CERTIFICATES	06/21/2024	12,041.18	2,871.88	2,817.53	1,924.01	2,035.49	9,648.90	1,194.02	22,884.10
		-	-	-	-	-	-	-	-
TOTAL TAX ROLL RECEIPTS		1,310,991.74	312,677.75	306,760.06	209,477.61	221,615.69	1,050,531.10	129,999.30	2,491,522.14
BALANCE DUE TAX ROLL		(5,081.85)	(1,212.04)	(1,189.11)	(812.01)	(859.06)	(4,072.21)	(503.92)	(9,657.98)
PERCENT COLLECTED TAX ROLL		100%	100%	100%	100%	100%	100%	100%	100%

C.

Bartram Park
COMMUNITY DEVELOPMENT DISTRICT

Fiscal Year 2024
Check Register

<i>Fund</i>	<i>Date</i>	<i>check #'s</i>	<i>Amount</i>
General Fund			
	7/1/2024 - 7/31/2024	1351-1353	\$11,441.69
	8/1/2024 - 8/31/2024	1354-1358	44,019.62
	9/1/2024 - 9/30/2024	1359-1360	12,202.47
TOTAL			\$67,663.78

* Fedex Invoices available upon request

CHECK DATE	VEND#	.....INVOICE..... DATE INVOICE	...EXPENSED TO... YRMO DPT ACCT# SUB SUBCLASS	VENDOR NAME	STATUS	AMOUNT	.....CHECK..... AMOUNT #
7/10/24	00012	7/01/24 265	202407 310-51300-34000	JUL MANAGEMENT FEES	*	3,975.00		
7/01/24		265	202407 310-51300-35110	JUL WEBSITE ADMIN	*	87.50		
7/01/24		265	202407 310-51300-35100	JUL INFO TECH	*	135.42		
7/01/24		265	202407 310-51300-51000	OFFICE SUPPLIES	*	.12		
7/01/24		265	202407 310-51300-42000	POSTAGE	*	10.15		
GOVERNMENTAL MANAGEMENT SERVICES							4,208.19	001351
7/10/24	00073	7/08/24 3421527	202404 310-51300-31500	APR GENERAL COUNSEL	*	633.50		
KUTAK ROCK LLP							633.50	001352
7/10/24	00056	7/05/24 252-2644	202407 310-51300-32300	FY24 TRUSTEE FEE 2015A-1	*	1,100.00		
7/05/24		252-2644	202407 300-15500-10000	FY25 TRUSTEE FEE 2015A-1	*	3,300.00		
7/05/24		252-2644	202407 310-51300-32300	FY24 TRUSTEE FEE 2015A-2	*	550.00		
7/05/24		252-2644	202407 300-15500-10000	FY25 TRUSTEE FEE 2015A-2	*	1,650.00		
THE BANK OF NEW YORK MELLON							6,600.00	001353
8/01/24	00057	8/01/24 08012024	202408 300-20700-10500	4/8/24 DUVAL TAX DIST 16	*	2,610.02		
8/01/24		08012024	202408 300-20700-10500	5/3/24 DUVAL TAX DIST 17	*	4,871.68		
8/01/24		08012024	202408 300-20700-10500	5/20/24 DUVAL TAX DIST 18	*	1,396.21		
8/01/24		08012024	202408 300-20700-10500	6/6/24 DUVAL TAX DIST 19	*	698.11		
8/01/24		08012024	202408 300-20700-10500	6/21/24 DUVAL TAX CERT	*	12,041.18		
THE BANK OF NEW YORK MELLON, N.A.							21,617.20	001354
8/01/24	00074	8/01/24 08012024	202408 300-20700-11000	4/8/24 DUVAL TAX DIST 14	*	2,091.47		
8/01/24		08012024	202408 300-20700-11000	5/3/24 DUVAL TAX DIST 15	*	3,903.80		
8/01/24		08012024	202408 300-20700-11000	5/20/24 DUVAL TAX DIST 16	*	1,118.82		
8/01/24		08012024	202408 300-20700-11000	6/6/24 DUVAL TAX DIST 17	*	559.41		

BPAR BARTRAM PARK BPEREGRINO

CHECK DATE	VEND#	INVOICE DATE	INVOICE	EXPENSED TO YRMO	DPT	ACCT#	SUB	SUBCLASS	VENDOR NAME	STATUS	AMOUNT	CHECK AMOUNT	CHECK #
8/01/24		08012024	202408	300-20700-11000						*	9,648.90		
		6/21/24	DUVAL TAX CERT						THE BANK OF NEW YORK MELLON NA			17,322.40	001355
8/26/24	00012	8/01/24	266	202408	310-51300-34000				AUG MANAGEMENT FEES	*	3,975.00		
		8/01/24	266	202408	310-51300-35110				AUG WEBSITE ADMIN	*	87.50		
		8/01/24	266	202408	310-51300-35100				AUG INFO TECH	*	135.42		
		8/01/24	266	202408	310-51300-51000				OFFICE SUPPLIES	*	.12		
		8/01/24	266	202408	310-51300-42000				POSTAGE	*	13.65		
		8/01/24	266	202408	310-51300-42500				COPIES	*	73.95		
									GOVERNMENTAL MANAGEMENT SERVICES			4,285.64	001356
8/26/24	00030	8/13/24	26329	202408	310-51300-31200				ARBIT SE2015 FYE 6/30/24	*	600.00		
									GRAU AND ASSOCIATES			600.00	001357
8/26/24	00067	8/08/24	24-05076	202408	310-51300-48000				REQUEST FOR ENGIN SERVICE	*	194.38		
									JACKSONVILLE DAILY RECORD			194.38	001358
9/17/24	00012	9/01/24	267	202409	310-51300-34000				SEP MANAGEMENT FEES	*	3,975.00		
		9/01/24	267	202409	310-51300-35110				SEP WEBSITE ADMIN.	*	87.50		
		9/01/24	267	202409	310-51300-35100				SEP INFORMATION TECH.	*	135.42		
		9/01/24	267	202409	310-51300-51000				OFFICE SUPPLIES	*	.06		
		9/01/24	267	202409	310-51300-42000				POSTAGE	*	51.80		
		9/01/24	267	202409	310-51300-42500				COPIES	*	117.45		
		9/01/24	267	202409	310-51300-41000				TELEPHONE	*	9.24		
									GOVERNMENTAL MANAGEMENT SERVICES			4,376.47	001359
9/24/24	00037	8/19/24	24483	202409	300-15500-10000				FY 25 INSURANCE RENEWAL	*	7,826.00		
									EGIS INSURANCE ADVISORS, LLC			7,826.00	001360
									TOTAL FOR BANK A		67,663.78		
									BPAR BARTRAM PARK BPEREGRINO				

CHECK DATE	VEND#	.....INVOICE..... DATE INVOICE	...EXPENSED TO... YRMO DPT ACCT# SUB SUBCLASS	VENDOR NAME	STATUS	AMOUNT	....CHECK..... AMOUNT #
TOTAL FOR REGISTER						67,663.78	

BPAR BARTRAM PARK BPEREGRINO

Governmental Management Services, LLC

1001 Bradford Way
 Kingston, TN 37763

Invoice

Invoice #: 265

Invoice Date: 7/1/24

Due Date: 7/1/24

Case:

P.O. Number:

Bill To:

Bartram Park CDD
 475 West Town Place
 Suite 114
 St. Augustine, FL 32092

Description		Hours/Qty	Rate	Amount
Management Fees - July 2024	0013105130034000		3,975.00	3,975.00
Website Administration - July 2024	0013105130035110		87.50	87.50
Information Technology - July 2024	0013105130035100		135.42	135.42
Office Supplies	0013105130051000		0.12	0.12
Postage	0013105130051000		10.15	10.15
	0013105130042000			
Total				\$4,208.19
Payments/Credits				\$0.00
Balance Due				\$4,208.19

KUTAK ROCK LLP

TALLAHASSEE, FLORIDA

Telephone 404-222-4600

Facsimile 404-222-4654

Federal ID 47-0597598

July 8, 2024

Check Remit To:
Kutak Rock LLP
PO Box 30057
Omaha, NE 68103-1157

0013105130031500
APR General Counsel

Mr. Jim Oliver
Bartram Park CDD
Governmental Management Services – St. Augustine
Suite 114
475 West Town Place
St. Augustine, FL 32092

Invoice No. 3421527
3223-1

Re: Bartram Park CDD - General Counsel

For Professional Legal Services Rendered

04/06/24	R. Dugan	0.10	26.50	Prepare Fiscal Year 2025 budget documents
04/11/24	W. Haber	0.20	70.00	Respond to audit inquiry
04/15/24	J. Gillis	0.40	58.00	Coordinate response to auditor letter
04/19/24	W. Haber	0.20	70.00	Review agenda for April meeting
04/24/24	T. Mackie	0.50	170.00	Prepare for and attend Board meeting by phone; follow-up from meeting
04/25/24	W. Haber	0.20	70.00	Review correspondence regarding budget notice and begin preparation of same
04/26/24	W. Haber	0.40	140.00	Review and revise budget notice
04/26/24	K. Jusevitch	0.20	29.00	Prepare budget hearing notice; confer with Haber and correspond with district manager regarding same
TOTAL HOURS		2.20		

KUTAK ROCK LLP

Bartram Park CDD

July 8, 2024

Client Matter No. 3223-1

Invoice No. 3421527

Page 2

TOTAL FOR SERVICES RENDERED \$633.50

TOTAL CURRENT AMOUNT DUE \$633.50



BNY MELLON

The Bank of New York Mellon
Trust Company, N.A.

INVOICE

BARTRAM PARK COMMUNITY DEVELOPMENT
DISTRICT, C/O GMS, LLC.
ATTN: JIM OLIVER
475 WEST TOWN PLACE, SUITE 114 WORLD GOLF VILLAGE
ST. AUGUSTINE, FL 32092

000001

Invoice Number: 252-2644881
Account Number: BARTRAM15-A1
Invoice Date: 05-Jul-24
Cycle Date: 01-Jul-24
Administrator: Caroline Cowart
Phone Number: 904-645-1919
Currency: USD

**BARTRAM PARK COMMUNITY DEVELOPMENT DISTRICT SPECIAL ASSESSMENT REVENUE REFUNDING
BONDS, SERIES 2015A-1**

	<u>Quantity</u>	<u>Rate</u>	<u>Proration</u>	<u>Subtotal</u>	<u>Total</u>
Flat					
Trustee Fee For the period: July 01, 2024 to June 30, 2025					4,400.00

Invoice Total:	4,400.00
Satisfied To Date:	0.00
Balance Due:	4,400.00

Terms: Payable upon receipt. Please reference the invoice and account number with your remittance.
Our Tax ID Number is 95-3571558. Please fax Taxpayer Certification requests to (732) 667-9576.
The Bank of New York Mellon Trust Company, N.A is located at 333 South Hope Street - Suite 2525,
Los Angeles, CA 90071

Check Payment Instructions: The Bank of New York Mellon Corporate Trust Department P.O. Box 392013 Pittsburgh, PA 15251-9013 Please enclose billing stub.	\$1100 FY24 Trustee Fee 0013105130032300 \$3300 = FY25 Trustee Fee (code to Prepaid) 0013001550010000
--	--

Billing Stub

BARTRAM PARK COMMUNITY DEVELOPMENT DISTRICT
SPECIAL ASSESSMENT REVENUE REFUNDING BONDS, SERIES
2015A-1

Invoice Number: 252-2644881
Account Number: BARTRAM15-A1
Invoice Date: 05-Jul-24
Cycle Date: 01-Jul-24
Administrator: Caroline Cowart
Phone Number: 904-645-1919
Amount: 4,400.00 USD

000000613828252D26448810000000000004400009



BNY MELLON

The Bank of New York Mellon
Trust Company, N.A.

INVOICE

BARTRAM PARK COMMUNITY DEVELOPMENT
DISTRICT, C/O GMS, LLC.
ATTN: JIM OLIVER
475 WEST TOWN PLACE, SUITE 114 WORLD GOLF VILLAGE
ST. AUGUSTINE, FL 32092

000001

Invoice Number: 252-2644882
Account Number: BARTRAM-A2
Invoice Date: 05-Jul-24
Cycle Date: 01-Jul-24
Administrator: Caroline Cowart
Phone Number: 904-645-1919
Currency: USD

**BARTRAM PARK COMMUNITY DEVELOPMENT DISTRICT SPECIAL ASSESSMENT REVENUE REFUNDING
BONDS, SERIES 2015A-2**

	<u>Quantity</u>	<u>Rate</u>	<u>Proration</u>	<u>Subtotal</u>	<u>Total</u>
Flat					
Administration Fee					2,200.00
For the period: July 01, 2024 to June 30, 2025					
			Invoice Total:		2,200.00
			Satisfied To Date:		0.00
			Balance Due:		2,200.00

Terms: Payable upon receipt. Please reference the invoice and account number with your remittance.
Our Tax ID Number is 95-3571558. Please fax Taxpayer Certification requests to (732) 667-9576.
The Bank of New York Mellon Trust Company, N.A is located at 333 South Hope Street - Suite 2525,
Los Angeles, CA 90071

Check Payment Instructions:
The Bank of New York Mellon
Corporate Trust Department
P.O. Box 392013
Pittsburgh, PA 15251-9013
Please enclose billing stub.

\$550 FY24 Trustee Fee 0013105130032300
\$1650 = FY25 Trustee Fee (code to
Prepaid) 0013001550010000

Billing Stub

BARTRAM PARK COMMUNITY DEVELOPMENT DISTRICT
SPECIAL ASSESSMENT REVENUE REFUNDING BONDS, SERIES
2015A-2

Invoice Number: 252-2644882
Account Number: BARTRAM-A2
Invoice Date: 05-Jul-24
Cycle Date: 01-Jul-24
Administrator: Caroline Cowart
Phone Number: 904-645-1919
Amount: 2,200.00 USD

000000613657252D26448820000000000002200007

Bartram Park CDD

GENERAL FUND

Check Request

Date	Amount	Authorized By
August 1, 2024	\$21,617.20	Bernadette Peregrino

Payable to:

Vendor #57 - BNY MELLON C/O Bartram Park - Series 2015
--

Date Check Needed:

Budget Category:

8/1/24	001.300.20700.10500
--------	---------------------

Intended Use of Funds Requested:

DUVAL COUNTY TAXES		
4/8/24	\$2,610.02	Duval Tax Dist 16
5/3/24	\$4,871.68	Duval Tax Dist 17
5/20/24	\$1,396.21	Duval Tax Dist 18
6/6/24	\$698.11	Duval Tax Dist 19
6/21/24	\$12,041.18	Duval Tax Certificates

\$21,617.20

(Attach supporting documentation for request.)

Bartram Park CDD

GENERAL FUND

Check Request

Date	Amount	Authorized By
August 1, 2024	\$17,322.40	Bernadette Peregrino

Payable to:

Vendor #74 - BNY MELLON C/O Bartram Park - Series 2022
--

Date Check Needed:

Budget Category:

8/1/24	001.300.20700.11000
--------	---------------------

Intended Use of Funds Requested:

DUVAL COUNTY TAXES		
4/8/24	\$2,091.47	Duval Tax Dist 14
5/3/24	\$3,903.80	Duval Tax Dist 15
5/20/24	\$1,118.82	Duval Tax Dist 16
6/6/24	\$559.41	Duval Tax Dist 17
6/21/24	\$9,648.90	Duval Tax Certificates

\$17,322.40

(Attach supporting documentation for request.)

Governmental Management Services, LLC

1001 Bradford Way
 Kingston, TN 37763

Invoice**Invoice #:** 266**Invoice Date:** 8/1/24**Due Date:** 8/1/24**Case:****P.O. Number:****Bill To:**

Bartram Park CDD
 475 West Town Place
 Suite 114
 St. Augustine, FL 32092

Description	Hours/Qty	Rate	Amount
Management Fees - August 2024	0013105130034000	3,975.00	3,975.00
Website Administration - August 2024	0013105130035110	87.50	87.50
Information Technology - August 2024	0013105130035100	135.42	135.42
Office Supplies	0013105130035100	0.12	0.12
Postage	0013105130051000	13.65	13.65
Copies	0013105130042000	73.95	73.95
	0013105130042500		
Total			\$4,285.64
Payments/Credits			\$0.00
Balance Due			\$4,285.64

Grau and Associates

951 W. Yamato Road, Suite 280
Boca Raton, FL 33431-
www.graucpa.com

Phone: 561-994-9299

Fax: 561-994-5823

Bartram Park Community Development District
1408 Hamlin Avenue, Unit E
Saint Cloud, FL 34771

Invoice No. 26329
Date 08/13/2024

SERVICE	AMOUNT
Project: Arbitrage - Series 2015 FYE 6/30/2024	
Arbitrage Services	
Arbitrage	\$ <u>600.00</u>
	Subtotal: <u>600.00</u>
	Total 600.00
0013105130031200 Arbit SE2015 FYE 6/30/24	Current Amount Due \$ <u>600.00</u>

0 - 30	31 - 60	61 - 90	91 - 120	Over 120	Balance
600.00	0.00	0.00	0.00	0.00	600.00

Payment due upon receipt.

Jacksonville Daily Record

A Division of
DAILY RECORD & OBSERVER, LLC

P.O. Box 1769
Jacksonville, FL 32201
(904) 356-2466

INVOICE

August 8, 2024

Date

Attn: Sarah Sweeting
GMS, LLC
475 West Town Place, Ste 114
Saint Augustine FL 32092

Serial #	24-05076D	PO/File #		\$194.38
				Payment Due

Request for Qualifications for Engineering Services

\$194.38

Publication Fee

Bartram Park Community Development District

Case Number		Amount Paid
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Publication Dates 8/8

Payment Due Upon Receipt
For your convenience, you may remit payment online at www.jaxdailyrecord.com/send-payment.

County Duval

If your payment is being mailed, please reference Serial # 24-05076D on your check or remittance advice.

Payment is due before the Proof of Publication is released.

0013105130048000

Your notice was published on both jaxdailyrecord.com and floridapublicnotices.com.

Terms: Net 30 days from date of invoice. Past due items will accrue a finance charge of 1.5% per month thereafter. Please remit any payment due upon receipt of this invoice.

Preliminary Proof Of Legal Notice
(This is not a proof of publication.)

Please read copy of this advertisement and advise us of any necessary corrections before further publications.

**REQUEST FOR
QUALIFICATIONS FOR
ENGINEERING SERVICES
FOR THE BARTRAM PARK
COMMUNITY
DEVELOPMENT DISTRICT**
RFQ for Engineering Services

The Bartram Park Community Development District ("District"), located in Duval County, Florida, announces that professional engineering services will be required on a continuing basis for the District's infrastructure improvements authorized by Chapter 190, Florida Statutes. The engineering firm selected will act in the general capacity of District Engineer and will provide District engineering services, as required.

Any firm or individual ("Applicant") desiring to provide professional services to the District must: 1) hold applicable federal, state and local licenses; 2) be authorized to do business in Florida in accordance with Florida law; and 3) furnish a statement ("Qualification Statement") of its qualifications and past experience on U.S. General Service Administration's "Architect-Engineer Qualifications, Standard Form No. 330," with pertinent supporting data. Among other things, Applicants must submit information relating to: a) the ability and adequacy of the Applicant's professional personnel; b) whether the Applicant is a certified minority business enterprise; c) the Applicant's willingness to meet time and budget requirements; d) the Applicant's past experience and performance, including but not limited to past experience as a District Engineer for any community development districts and past experience with the [Jurisdiction]; 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 Con-

sultant's Competitive Negotiations Act, Chapter 287, Florida Statutes ("CCNA"). All Applicants interested must submit electronic copies of Standard Form No. 330 and the Qualification Statement by 12:00 p.m. on October 1, 2024 to the attention of Sarah Sweeting (by email to: ssweeting@gmsnf.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).

Aug. 8

00 (24-05076D)

Governmental Management Services, LLC

1001 Bradford Way
Kingston, TN 37763

Invoice

Invoice #: 267
Invoice Date: 9/1/24
Due Date: 9/1/24
Case:
P.O. Number:

Bill To:

Bartram Park CDD
475 West Town Place
Suite 114
St. Augustine, FL 32092

Description	Hours/Qty	Rate	Amount
Management Fees - September 2024		3,975.00	3,975.00
Website Administration - September 2024		87.50	87.50
Information Technology - September 2024		135.42	135.42
Office Supplies		0.06	0.06
Postage		51.80	51.80
Copies		117.45	117.45
Telephone		9.24	9.24
		Total	\$4,376.47
		Payments/Credits	\$0.00
		Balance Due	\$4,376.47

INVOICE



Customer	Bartram Park Community Development District
Acct #	194
Date	08/19/2024
Customer Service	Kristina Rudez
Page	1 of 1

Bartram Park Community Development District
 c/o Government Management Services, LLC
 475 West Town Place, Suite 114
 St. Augustine, FL 32092

Payment Information	
Invoice Summary	\$ 7,826.00
Payment Amount	
Payment for:	Invoice#24483
100124146	

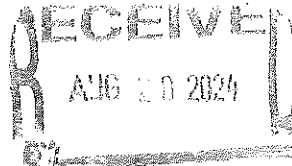
Thank You

Please detach and return with payment



Customer: Bartram Park Community Development District

Invoice	Effective	Transaction	Description	Amount
24483	10/01/2024	Renew policy	Policy #100124146 10/01/2024-10/01/2025 Florida Insurance Alliance GL,POL,EPLI,EBL,HNO - Renew policy Due Date: 8/19/2024	7,826.00



Total
\$ 7,826.00

Thank You

*FOR PAYMENTS SENT OVERNIGHT:
 Bank of America Lockbox Services, Lockbox 748555, 6000 Feldwood Rd. College Park, GA 30349*

Remit Payment To: Egis Insurance Advisors P.O. Box 748555 Atlanta, GA 30374-8555	(321)233-9939	Date
	sclimer@egisadvisors.com	08/19/2024