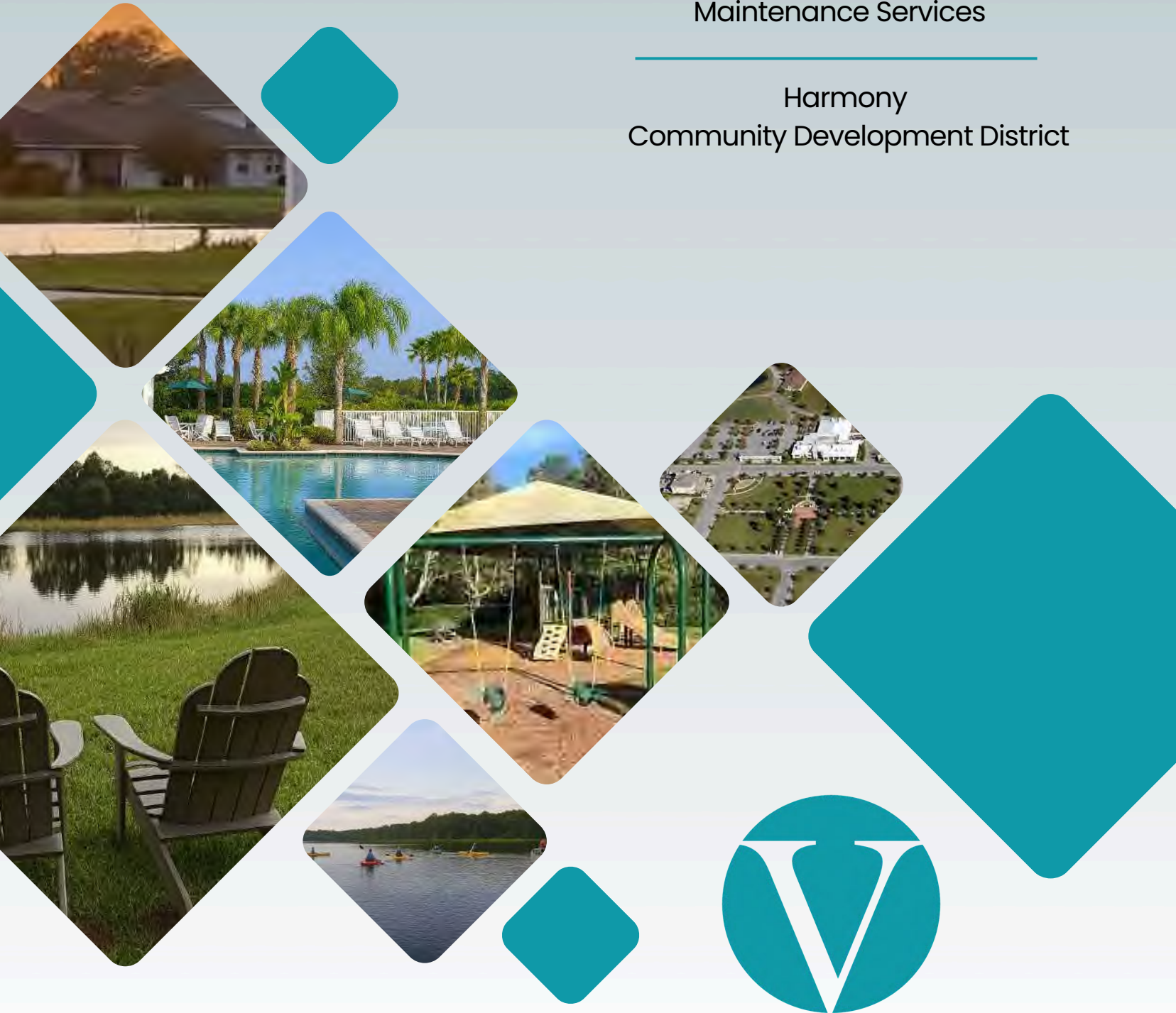


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## Proposal for Field Management and Maintenance Services

Harmony  
Community Development District



# Vesta Property Services

Your *Community*, Our *Commitment*

250 International Pkwy #208 | Lake Mary, FL 32746 | (321) 263-0132

# FLORIDA'S COMMUNITY MANAGEMENT SPECIALIST

*A 30-YEAR TRACK RECORD WORTHY OF YOUR TRUST*

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CELEBRATING 30 YEARS OF SERVICE  
TO OUR COMMUNITIES  
1995 - 2025



July 28, 2025

Harmony Community Development District – Proposal for District Management

Dear Board of Supervisors,

We very much appreciate this opportunity to submit our proposal detailing how Vesta Property Services, Inc. is well-qualified to provide day-to-day management of your District's amenities, infrastructure, common areas, and activities.

At Vesta, we pride ourselves on our professionalism and three-decade track record of sustained resident satisfaction and trust. Since 1997, Vesta has been continuously and successfully providing contracted Amenity Management Services to communities similar to Harmony throughout the state of Florida.

We fully understand how important your District's amenities and lifestyle are to you and your fellow residents. In our enclosed information, you will find:

- Comprehensive Bios for our multi-dimensional Leadership Team.
- An extensive list of clients for whom we deliver similar property management services.
- Vivid examples of creative lifestyle offerings that we provide for other CDDs
- Detailed information on Vesta's approach to Quality Assurance.
- Resident and Board Supervisor quotes throughout

We look forward to discussing how Vesta can best-meet your needs, in hopes of forming a long-term and successful partnership with you and your District. We look forward to being able to share our approach at your meeting on August 7th, and answer any questions you may have.

Most respectfully,



*Kyle Darin*  
*Regional Director*  
250 International Pkwy #208  
Lake Mary, Florida 32746  
(321) 263-0132 x742





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## TESTIMONIALS

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*When Vesta became our management company, it felt like a breath of fresh air. Their on-site personnel are far superior to our previous managers. They are supported by a league of central office advisors who have spent time in our community updating and 'polishing' our systems.*

*The end result is a more informed Board and a happier community. Vesta's senior management is always available when needed. I have been on our CDD Board for ten years; my only regret is that we didn't switch to Vesta sooner.*

Howard Entman, Board Chairman; Marshall Creek CDD

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*We have been extremely happy with how well Vesta Property Services has handled the restaurant and amenities here in Grand Haven. The staff do a great job and we hope they are here for many years to come! THANK YOU!*

Donna and Shelby Oatts – Grand Haven CDD

---

*We changed to Vesta in 2019 and the differences operationally and professionally are night and day!*

*Vesta's diligence finds and resolves items that were overlooked previously. They have the talent and resources to handle a lot of these items in-house, something that typically is contracted out by others, at a much higher rate.*

Brandon Kirsch, Board Chairman – Tisons Landing CDD

---

*Vesta effectively ensures compliance with Southaven CDD policies. The presence of a competent on-site individual responsible for enforcing regulations and maintaining operational efficiency is highly valued.*

Dick Fetter, Board Chairman; Southaven CDD

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**Please take the time to view our other testimonials placed throughout the proposal.**



COPY



# PERSONNEL



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## MANAGEMENT SUPPORT

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### Jay King Regional President



TOP  
WORK  
PLACES

Jay brings over 30 years of management experience from diverse private and public sectors. Joining Vesta in 2015, he served on a CDD Board for 8 years and has been on an HOA board since 2018. A Navy Veteran and cancer survivor, Jay now oversees and supports our Northeast Zone, consisting of 80+ communities. In his free time, Jay finds joy in family, church activities, swimming, kayaking, biking, and downhill skiing.

### Jason Davidson Regional General Manager



TOP  
WORK  
PLACES

Jason brings over 15 years of experience in Amenity Operations and Facility Maintenance, with diverse roles in Community Management. With a background as the Facilities Director at Julington Creek Planation for 9 years and General Manager at RiverTown for 7 years, he is known as one of Vesta's most adaptable team members. Jason's wide-ranging skills cover overseeing community events, managing on-site restaurant operations, enhancing guest services, fitness facilities, and overall community upkeep. He has played key roles in developing communities like RiverTown and WaterSong, shaping many of Vesta's current Standard Operating Procedures, Policies, and Protocols. Jason's dedication to community management is reinforced by his family – his wife, two children, and their beloved bulldog!

### Dan Fagen Director of Amenity Operations



TOP  
WORK  
PLACES

Dan possesses more than 25 years of experience in hospitality, managing private clubs and extensive recreational facilities. Since joining Vesta in 2005, he has served as an onsite amenity manager at various top-tier communities in Northeast Florida.

With over 15 years as Director of Amenity Services, Dan offers valuable support to numerous amenity managers with significant contracts. One of his key roles involves establishing and exchanging best practices to uphold Vesta's commitment to delivering exceptional service to the communities we serve. In his free time, Dan finds pleasure in hiking and woodworking.

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## MANAGEMENT SUPPORT

### Dana Harden

#### Regional General Manager



Dana Harden brings two decades of experience and a diverse background in property management. She holds certificates in accounting and office technology, previously working as a staff accountant before joining Vesta. Dana specializes in supporting Community Development Districts, with a solid understanding of chapter 190. Joining Vesta in 2019, she became a LCAM the same year and achieved her PCAM certification through the Community Associations Institute. Dana was honored as the Community Association Manager of the Year for 2023 by the Northeast Florida chapter of CAI. She is also a US Army Veteran.

### Ross Ruben

#### Regional Lifestyle Director



Ross brings over two decades of experience in events, programming, and entertainment from reputable organizations such as MTV Networks, Universal Studios, Sea World Orlando, and various top-ranked entertainment and event companies on the East coast. Joining Vesta in 2016 after a successful tenure as Lifestyle Director at Julington Creek Plantation for a year, Ross was later promoted to a Regional role by the end of 2017. He plays a key role in enhancing the quality of programming, events, and marketing internally, contributing significantly to the improvement of our Northeast Florida client-communities year after year.

### Sean Smith

#### Regional Aquatics Director



Sean, the Regional Aquatics Director for the North Florida area, boasts over 17 years of experience in the Aquatics Industry. Collaborating with various Premier Communities in the region, he became part of Vesta in 2013. Sean's role involves spearheading the development and execution of Aquatics Programming across all our properties, encompassing Lifeguarding Certification, CPR/AED/First-Aid Training, and Swim Instruction. During the peak season, Sean oversees a team of over 200 lifeguards.



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## MANAGEMENT SUPPORT

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TOP  
WORK  
PLACES

### Charlotte Whitehead

#### Regional Administrator

Charlotte has been part of Vesta's Northeast Florida flagship community, Julington Creek Plantation, since 2013, taking on various roles. She began as a part-time Administrative Assistant and has progressed to her current position through dedication and hard work for her community and Vesta.

As the Regional Administrative Services Director, Charlotte leverages her wealth of experience in customer service, accounting, and human resources gained from years in the retail and hospitality industries. Being a resident of Julington Creek, she brings an unmatched level of commitment to serving the CDD, her community, and Vesta. During her free time, Charlotte enjoys working out and spending time with her family.



TOP  
WORK  
PLACES

### Jacquelyn Chau

#### Regional Human Resources Business Partner

Jacquelyn brings over 13 years of HR expertise, including recruitment, compliance, talent management, payroll, and workforce planning. After serving as a regional manager at Massage Envy for 8 years, overseeing 200 employees, she joined Vesta as an HR Assistant in 2017. Since May 2020, Jacquelyn has excelled in her role as an HR Business Partner. In this capacity, she collaborates closely with senior operations leaders, focusing on talent and performance management, retention, and workforce planning. Jacquelyn also ensures high standards in employee relations, policy implementation, HRIS support, and State and Federal HR compliance, while regularly visiting all managed communities in Northeast Florida.



TOP  
WORK  
PLACES

### Priscila Gieselman

#### Regional Accountant

Priscila brings 12 years of property management expertise in Jacksonville and 15 years of accounting experience. She has a background in property ownership and management, liaising with board members. Priscila became part of Vesta in April 2017, where she played a crucial role in supporting Julington Creek Plantation CDD, a key account. Additionally, she is responsible for preparing and submitting monthly sales tax reports to the Florida Department of Revenue, ensuring current licenses and certificates for the café, handling vendor applications, managing client invoices, overseeing payroll, conducting Profit & Loss analysis, and completing end-of-month reconciliations. Priscila also assists frontline managers in Northeast Florida by addressing their inquiries promptly. In her free time, Priscila enjoys biking and traveling.

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## MANAGEMENT SUPPORT

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**Kyle Darin**  
Regional Director

Kyle has been with Vesta Property Services since 2021, first serving as our onsite General Manager at MiraBay (Harbor Bay CDD) in Apollo Beach. Prior to Vesta, Kyle held executive leadership roles in world-class hotels and resorts in Tampa, Boca Raton, Las Vegas, and Orlando. Kyle specializes in operations and process management, having led several optimization and efficiency initiatives during his operational career at locations such as the Boca Raton Resort & Club, a Waldorf Astoria Resort, The Hilton and Waldorf Astoria Bonnet Creek, and The Venetian | The Palazzo Las Vegas.

With over 17 years of leadership experience, Kyle has managed budgets in excess of \$100M, teams as large as 4,000 associates, oversaw and managed several capital projects, hotel and community clubhouse renovations and rebranding, and brings with him a passion for service excellence, employee training, and effective management of staff. In his role as District Manager, Kyle was able to provide valuable counsel to boards, sharp insight during the budget process, professional and effective communication, and skilled leadership and management of vendors and fellow staff. Kyle prides himself on building, maintaining, and improving relationships across all industries, and is able to leverage those relationships to benefit his clients.



**Scott Smith**  
Regional Vice President

Scott Smith brings over 17 years of experience serving special districts and communities across Florida. He joined Vesta in 2020 and was promoted to Vice President of District Services in 2022, where he leads and supports the District Services team statewide.

Before joining Vesta, Scott spent 12 years with a Tampa-based District Management firm, serving in roles including District Manager, Onsite Amenity Manager, and Association Manager. His background also includes management roles in the hospitality industry with Universal Studios and The Florida Aquarium.

Scott is actively involved in several industry associations and is a proud graduate of the Leadership Tampa Bay Class of 2020.

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## CORPORATE LEADERSHIP



TOP  
WORK  
PLACES

**David Surface**  
Chief Executive Officer

David has been the CEO of Vesta since 2020, overseeing the company's executive team and day-to-day operations. During the past decade, he has been significantly responsible for Vesta's strong growth by spearheading our mergers-and-acquisitions and strategic partnerships. As a result, Vesta has tripled in size during this period and achieved widespread recognition as a leading, full-service property management company in Florida.

David's career experience includes all aspects of real estate, both commercial as well as residential. Prior to joining Vesta, David was managing partner for a real estate finance, management, and brokerage company serving institutional clients



TOP  
WORK  
PLACES

**Christine Richie**  
Chief Accounting Officer

Chrissy was appointed Corporate Controller in June 2013 to oversee the accounting functions and human resources administration for Vesta Property Services. She previously served as Chief Financial Officer for a multimillion-dollar healthcare provider operating in 14 states. With over 25 years of leadership experience in corporate finance and accounting, Chrissy has developed accounting and financial infrastructure for multiple start-up companies that include accounting systems, compliance, and risk management, as well as implementation of employee benefit plans, employee policies and procedures, and training and organizational development.



TOP  
WORK  
PLACES

**Daniel Armstrong**  
Chief Financial Officer

Dan oversees the financial and administrative functions of Vesta's corporate entity. His career has included the performance and oversight of accounting, administrative services, and financial reporting for a range of entities, from large corporations following SEC requirements, to non-profit associations, clubs and trusts which serve many of our clients, and special-purpose entities that provide financing for purchasing related association facilities.

Dan started as a Florida CPA at Deloitte & Touche in 1993, specializing in the audits of publicly traded and real estate clients. He joined Vesta as Controller in 2001.





**EXPERIENCE**





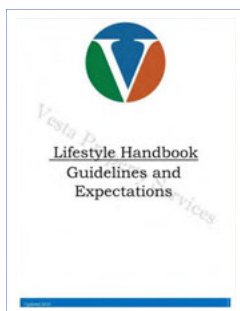
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## COMMUNITY EVENTS



- Neon Parties
- Summer Kickoff
- Luaus
- Polar Plunge
- Vendor Fairs
- Carnivals
- Potlucks
- Cook-offs
- Murder Mystery
- Scavenger Hunts
- Ice Cream Socials
- 5K's and Triathlons
- Slide Races
- DJs with Pool Games
- Science Demos
- Mother Son Dances
- Spring Fling
- Halloween/Fall Festival
- Santa Claus Visits
- Golf Cart Parade
- Letters to Santa
- Memorial Weekend
- Independence Day Celebration
- Daddy Daughter Dances
- Valentine's Crafts
- Rock Your Shamrock – St. Patrick's Day
- Veteran's Day Celebration
- Easter Egg Hunts
- Mad Hatter Tea Party
- Social Hours with Live Music
- Stand Up Comedy Nights
- Mixology Classes
- Cooking Classes
- Jimmy Buffett Day parties
- Local liquor tastings with cigars
- Chocolate Making Class
- Axe Throwing
- Food Truck Nights
- Jurassic Back-to-School
- Yoga at the Park
- Classic Cars and Coffee
- Foam Parties
- Community Olympics

### Resources and Support For Vesta's Property Managers



- Regional Lifestyle Director with 20+ years of experience in events, entertainment and programming for multiple, high-quality companies and communities.
- Vesta's 50-page Lifestyle Handbook used for training and reference.
- Hands-on help with staff turnover/transitions and Managers' use of PTO benefits.
- Preferred Vendors List, enabling some of the best pricing in the industry.
- Quarterly Lifestyle Newsletter provided to the entire state, featuring new vendors, new ideas, and more for *all* Vesta Amenity Managers.
- Monthly Training sessions; Quarterly Idea-Sharing sessions with all Managers.
- Shared Expertise: Oversee 12 Community Events Budgets (\$9,000-\$110,000/yr.)

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## COMMUNITY PROGRAMMING

- Zumba
- Amenity Athletics
- Aqua Fitness
- Yoga
- Pilates
- Soccer Shots
- Spin/Cycle
- S.T.E.M. programs for kids

- Kids and Adult Art Classes
- Swim Lessons
- Tennis
- Self Defense
- CPR and AED
- Meditation
- F3 Men's Fitness
- Pickleball

- Mah Jongg
- Stretching
- Book Clubs
- Summer Camps
- Youth Athletic Leagues
- Dance: Hip Hop and Ballet
- Basketball lessons
- Swim Team Events



# AMENITY ATHLETICS





“

Hey Todd!

*You do an amazing job with the events that you administer. And those events have become a hallmark of our community as they do a great job of fostering community engagement and cohesiveness and are greatly appreciated.*

Heritage Landing CDD Resident

”



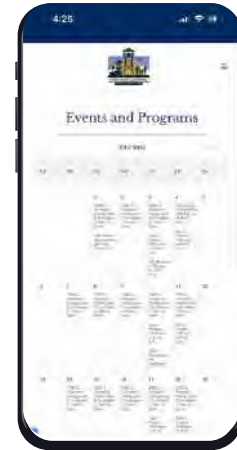


# COPY COMMUNITY WEBSITE

Vesta develops, hosts, and manages contemporary, mobile and user-friendly community websites and apps. Examples include:

- RiverTownAmenities.com
- DurbinCrossingLiving.com
- FIPLiving.com
- Improved, convenient resident communications
- Optional event calendars with RSVPs and ticketing, reporting requests to Management, online ordering, and much more.
- Easily-managed administrative tasks
- A secure payment process
- Convenient resident registration/RSVPs for activities, events and programs
- Amenity facility reservation capabilities
- Committee and Group pages
- Dynamic forms
- Industry leading customer support
- Top-of-the-line technology
- Easy-to-use, clean, professional interface

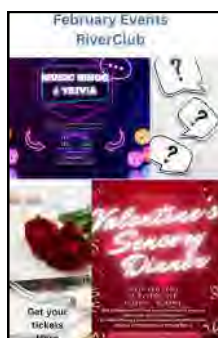
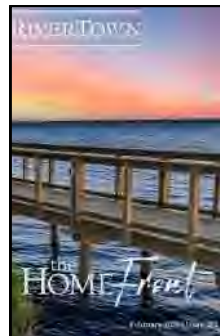
Vesta is willing to work with to those communities that wish to keep current websites or apps, and will provide support accordingly.



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## RESIDENT ENGAGEMENT

- Comprehensive, creative and high-quality lifestyle and maintenance newsletters, flyers, e-blasts, and other forms of resident engagement.
- Engaging bulletin boards throughout the community filled with flyers and newsletters.
- Our teams are trained to take photos and video at community events and programs to share our real-time resident engagement.
- Social media management including Instagram, Facebook and Twitter, with Board approval.
- QR Code Surveys assess resident feedback throughout the year in order for us to make adjustments according to community wants and needs.
- Constant onsite discussions with residents during the year help us understand expectations.





## **Vesta's Approach to Quality Assurance**

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

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

We do not use all of these tools at every account, but we do use most them at our largest accounts based on amount of resources, scope of services and Board driven priorities to ensure the best use of finite resources.



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

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## OPERATIONAL ANALYSIS

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

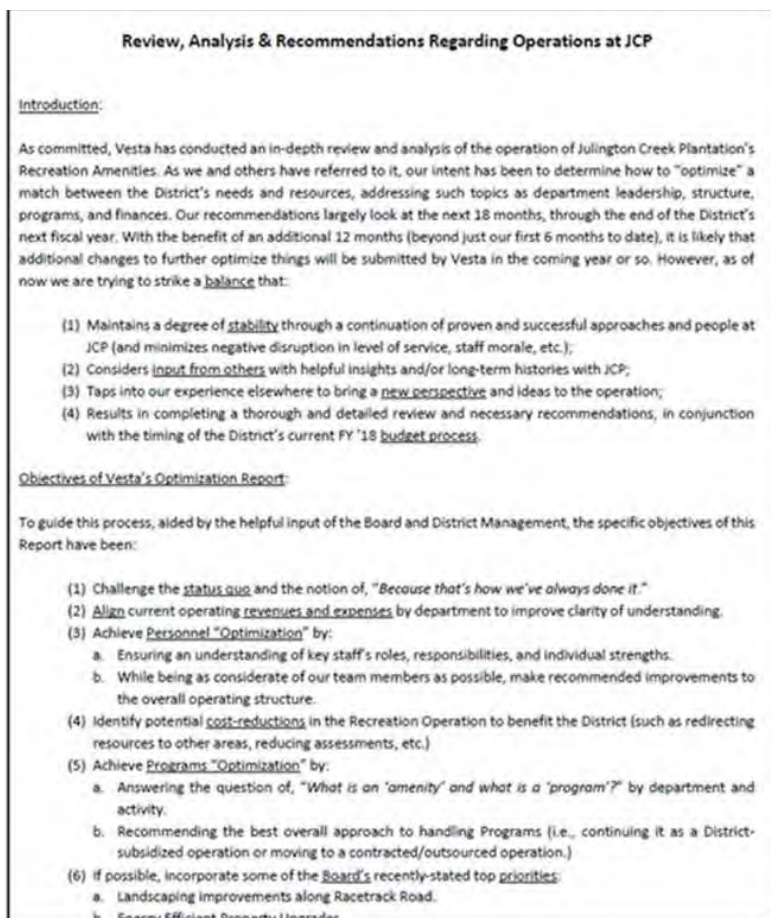
### Julington Creek Plantation CDD Example

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

The implementation of our recommendations resulted in:

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

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



We keep track of **Action Items from your CDD meetings**, confirm we have them correctly captured within 48 hours of the meeting via email, and then provide to all board members and staff. We then provide updates until completion of each item to ensure nothing is dropped and expectations are managed accordingly. Our Master Task List is developed during facility walk/inspections. This list also includes capital and regular project list costs to ensure we are working proactively.



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## BOARD REPORTING AND ENGAGEMENT

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

### Board Reporting Includes:

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



**Heritage Landing CDD Meeting**  
December 12, 2024, 5:00 PM

**Item of Report: December 5, 2024** **Land Schell, Assistant Manager**

- **December Special Event—No Board Action Required**
  - Pictures and Videos with Santa will be held on Friday, December 6 and Saturday, December 7, from 4:00 p.m. to 6:00 p.m. Residents can sign up for two mystery experiences with Santa. Families with kids may sign up between 7:30 and 8:00 p.m. with adults. This event will feature hundreds of beautiful sugar cookies, hot chocolate with marshmallows, a hot CFF beverage and this will be easy to complete, and a Lottery for Santa station where kids can fill out a letter to Santa place the letter in an envelope addressed to the North Pole, add lucky charms and the letter will be your magical "North Pole" and placed in Santa's mailbox.




Photographs for the  
Futures: 2025, Santa event

- **Submission of Two Minutes—Board Action Required**
  - Two minutes issues were suspended on 11/25/24 for setting a fine as the FTE assistant. The level of infraction requires the Board's review to determine the length of suspension.



**Heritage Landing CDD Meeting**  
April 10, 2025  
Field Operations Manager Report  
CDD Item: 4/1/2025

**Picture reports:**





We continue to replace the old walkway planks.

**Basketball court repair:**





Broken and missing boards were replaced and installed.

**Picnic bench repairs:**





We have made some structural repairs to the composite benches, some of the 4x4's and 6x4's were cracked. We used metal angle iron to strengthen some of the legs on the large benches.

**Slide tower ladders painted:**









**Fence repair:**






The fence along the sidewalk in the back of the multi-purpose field continues to be trampled. We have made several repairs in that area.

**Tennis backstops:**






Due to some strong winds, we had several windbreakers pulled off the fence. We reattached them with new zip ties.

**General maintenance:**



A new crank was installed on one of the adjustable basketball post.

**Advised some roll on breadfruit crossover:**



**New light installed at marquee:**



**New interior door handles are installed in the bathrooms:**



**Several plants at playground replaced:**



**Rec pool repairs:**





The cracked step that been repaired, the water was drained below the step to allow for the repair to be made. We completed a form with the county to receive a discount on our bill, we anticipate around \$6,000 gallons will be replaced. The rust spots were repaired, and one had an old form rail that was left behind the tiles and it's not tied into the pool finish.

**Rec pool observations when drained:**




Before we drained the rec pool we could not see a couple of areas that showed the spalling of the sand colored marble.



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## RESIDENT SATISFACTION

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

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

### QR Coded Resident Survey (example below)

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

JCP Creekside Café Questionnaire

Please rate your overall satisfaction with the café.

1 2 3 4 5

Poor ○ ○ ○ ○ ○ Excellent

Please rate the quality of the food at the café.

☐ Poor  
☐ Okay  
☐ Good  
☐ Great  
☐ Excellent  
☐ N/A

Please rate the quality of the drinks at the café.

☐ Poor  
☐ Okay  
☐ Good  
☐ Great  
☐ Excellent  
☐ N/A

Please rate the value of the food at the café.

1 2 3 4 5

Poor ○ ○ ○ ○ ○ Excellent

at the café.

2 3 4 5

○ ○ ○ ○

How often?

How often?

Would you like us to follow up with you for any additional feedback or comments? If so, please leave your email or phone number.

Your answer

Submit



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

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

Scope of Services & Measurables		Value	Observations/Comments
		0 through 4	
<b>L1</b>	<b>Upon entering the Amenity Center</b>		
<b>a</b>	Event and programming materials on display	4	Newsletters are printed out and up at both amenity centers
<b>b</b>	Staff would be able to share the following		
	Website	N/A	
	Amenities available to the residents		Clint is very aware of everything we offer at RiverTown, helps potential home buyers by providing answers about amenities, events and programs. Staff very knowledgeable of all amenities also.
	Whom to contact to process a new resident	4	Clint and Jason both have access to do this. Staff knows to send them to either one of them.
	Whom to contact to acquire a rental	4	Clint takes care of all rentals proficiently (less than 1 hour)

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

<b>Peer Site Review</b>	
<b>Objective:</b> Gain a thorough understanding of day-to-day operations. Discuss items such as current contracted services, staffing, project work, vendors, trends and challenges. Most importantly share best practices and look for opportunities to learn and provide input to one another. Take notes as both the host and the visitor. Submit to your supervisor for recording purposes.	
<b>Date:</b> 1/3/22	<b>Visitor:</b> James Robinson
<b>Property:</b> Durbin Crossing	<b>Host:</b> Ben Conner
<b>Notes/ Observations/ Best Practices</b>	
Get contact info for fitness preventative maint company from Ben. Durbin was pleased with professionalism and response time of the vendor.	
Recently did a paint RFP for facility exterior. Get the template to use for upcoming RFP	
Forward contact info from our current vendor, Welch's Tennis. Durbin is looking to renovate	
Consider branding tennis windscreens. Looks sharp! Research budget	





## AUDITS

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

### Audits

- When a leader witnesses an interaction between a resident and a team member that has an opportunity to be improved on or to be reinforced or celebrated, the individual is pulled aside informally at the first available moment to coach or congratulate.
- We have several audit checklists that our Regional teams use during site visits and walkthroughs which allow us to observe and make improvements where needed.

Date:		Grading Scale Value	
Community:		4 Evaluation demonstrates a high level of proficiency	
Onsite Manager(s):		3 Evaluation demonstrates proficiency	
Manager Title:		2 Evaluation demonstrates partial proficiency	
Supervisor:		1 Evaluation demonstrates minimal proficiency	
Supervisor Title:		0 No evidence of proficiency	
Scope of Services & Measurables		Value 0 through 4	Observations/Comments
<b>A1 Upon entering the Amenity Center</b>			
a	Amenity Center was clean and free of safety hazards		
b	Staff would be able to share the following		
	Hours of operation		
	Amenities available to the residents		
	Whom to contact to process a new resident		
	Guest Pass Policy		
	Any programming that may be provided		
	Info on any up and coming events		
	Where to locate the policies and procedures		
	Ability to transition you to the Amenity/General Manager in a timely manner		
<b>A2 Upon Meeting with the Manager</b>			
a	Office appeared to be organized and well kept		
b	Manager was able to provide you with		
	Review camera's to ensure proper greetings by FAs		
	SOP's specific to the operation		
	EAP's specific to the operation		
	Emergency Response Plan		
	Accident/Incident Report Examples		
	Current staff's schedule		
	Communication Log with staff (PDL)		
	Recent Quality Checks		
	Reporting examples to DIMBOS		
	Action Items List for previous BOS meeting		
	Completed Checklists		
<b>A3 Manager has the ability to</b>			
	Initiate the Hiring Process		
	Access the Vesta Server		
	Post NCBS		
	Post lifeguard hours		
	Post credit card receipts & reports		
	Draft and post schedules through Paycom		
	Run labor allocations		
	Analyze most recent P&L and identify opportunities		

### Lifeguard Audits

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



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## VENDOR MANAGEMENT

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

RECDD I, II and III Landscape Deficiency Report

Landscape Accountability Tool

Contracted Item Description		January		February		March		April		May		June															
		1/3-1/9	1/10-1/16	1/17-1/23	1/24-1/30	1/31-2/6	2/7-2/13	2/14-2/20	2/21-2/27	2/28-3/6	3/7-3/13	3/14-3/20	3/21-3/27	3/28-4/3	4/4-4/10	4/11-4/17	4/18-4/24	4/25-5/1	5/02-5/08	5/09-5/15	5/16-5/22	5/23-5/29	5/30-6/05	6/06-6/12	6/13-6/19	6/20-6/26	
Reporting & Communication	Contractor shall provide to management a written report of work performed for each week with notification of any problem areas and a schedule of work for the upcoming month. (Friday each week) (pg 3)	5	5	5	5	5	5	5	5	5	5	4	4	5	5	5	5	5	5	5	1	4					
	Contractor shall then within the time period specified by the District Representative, or if no time is specified within forty-eight (48) hours, explain in writing what actions shall be taken to remedy the deficiencies. (Tuesday each week) (pg 3)	4	4	4	4	4	3	4	4	5	5	5	3	3	3	4	2	3	4	4	3	3					
	A representative of the grounds maintenance service crew will report to the on-site management office immediately upon arrival to the site. A representative shall report to the on-site management upon departure from site. (pg 19)	5	5	5	5	5	5	5	5	4	5	5	5	5	5	5	5	1	5	4	4	2	2				
	Ground maintenance supervisor and a representative of the District will inspect the entire property subject to this agreement once per month. (pg 19)	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5				
Mowing, Edging & Trimming	This schedule shall state how many mowings per week during the growing season and dormant season. Notwithstanding the above, at no time will the turf grasses be allowed to grow beyond the following: Bermuda grass beyond a maximum height of two (2) inches; St. Augustine grasses beyond four and one half (4 1/2) inches; and Zoysia grasses beyond four (4) inches (pg 14)																										
	Mow Bermuda Turf- March 1- November 1- Once a week and November 1- March 1- Once a month. (pg 14)	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	1	3					
	Mow St. Augustine Turf - March 1- November 1- Once a week and November 1- March 1- Once every two weeks. (pg 14)	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	1	3				
	Mow Zoysia Turf - March 1- November 1- Once a week and November 1- March 1- Once every two weeks. (pg 14)	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	1	3				
	Mow Bahia Turf - March 1- November 1- Once every two week and November 1- March 1- Once a month (pg 14)	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	1	3				
Turf Management	Contractor is to include with its bid a detailed annual maintenance program to ensure optimum quality and performance of Bermuda St. Augustine, Zoysia and Bahia grasses. In addition to a detailed mowing schedule, program is to include detailed timed events such as fertilization, aeration and thatch removal. (pg 14)	3	3	4	4	4	5	4	3	4	4	5	5	5	5	5	5	5	5	4	4	3	3				
Pond Areas	Pond areas will be maintained within three (3) feet of the water's edge unless otherwise directed by the District. Vegetation within three feet of the water's edge will be controlled with use of a string/line trimmer or other mechanical means. Vegetation within these limits should be maintained in a clean condition with the rise and fall of the water line. (pg 15)	5	5	5	4	4	4	4	4	4	3	4	5	3	3	3	3	3	4	3	2	3	3				
	Any trash debris in the water within arm's reach of Contractor shall be removed and disposed of offsite. (pg 15)	5	5	4	3	4	4	3	3	3	3	4	4	4	3	4	3	2	3	3	3	4	4				
Tree & Shrub Care	Trees, hedges, plants, vines, and shrubs shall be pruned by Contractor on an ongoing basis removing broken or dead limbs at least once (1x) a month or more, as necessary, to provide a neat and clean appearance. All the plant beds around the pond perimeters are to be maintained in the same manner as all other plant beds within the community. (pg 16)	3	3	4	4	4	4	4	4	4	4	4	4	4	4	3	3	2	3	3	3	3	3				
	Ornamental grasses will be cut back once a year in late winter. (pg 16)			5	5	5	5	5																			
	All deciduous trees shall be pruned when dormant to ensure proper uniform growth. (pg 16)			5	5	5	5	5																			
	All evergreen trees shall be pruned in the early summer and fall to ensure proper growth and proper head shape. (pg 16)																										
	Sucker growth at the base of all trees shall be removed by hand continuously throughout the year. Aesthetic pruning shall consist of the removal of dead and/or broken branches as often as necessary to have trees appear neat at all times. (pg 16)	4	4	4	4	4	4	3	4	4	4	4	4	4	4	3	4	4	4	4	4	4	4				
	Branches and limbs shall be kept off buildings, including roofs, sign wall structures, and pruned over sidewalks and parking lots so as not to interfere with pedestrians or cars. (This is to include maintaining a minimum of six to eight (6-8) feet of clearance under all limbs over sidewalks and ten to twelve (10-12) feet clearance above all driveways and ROW's depending on location and species of tree.) Hedges, shrubs and ground covers are to be maintained twelve to eighteen (12-18) inches away from buildings, fences and other structures. (pg 17)	3	3	3	3	4	4	3	4	4	4	5	4	4	4	4	4	3	3	4	4	3	3				
	Trim buffer area along the Riverfront Park - Trimming of buffer area to four (4) feet high from the south lookout north 3,200 feet to the extent of the cleared portion of park. This to include any saplings, Sabal Palmetto fronds above four (4) feet and tall weeds. (pg 17)				5																						





# COPY VENDOR MANAGEMENT

Pond Scorecard with Map

Pond Number	Pond Location	Last Onsite Staff Inspect Date	Recent Treatment Date	Previous Treatment Date	Debris Removal	Algae	Submersed Vegetation	Shoreline Grass & Brush	Floating Weeds	Water Quality Enhancer/Oxygen test	Pond Dye Added	Phoslock / Phosphate Binder	Outfalls and Street Drains	Concerns Received
SC 1	Entry side of Leo from 210													
SC 2	Entry side from Leo to St. Johns Golf Dr.													
SC 3	Hole 16 after tee box on St. Johns Golf Dr.													
SC 4	Runs along Hole 17 to Hole 16													
SC 5	Between Holes 16 and 9													
SC 6	Between Leo and Hole 9													
SC 7	Near Hole 16 tee box													
SC 8	Runs along hole 15													
SC 9	Intersection of St. Johns Golf Dr. & Eagle Point													
SC 10	Between Hole 14 and 13													
SC 11	Behind Hole 13													
SC 12	Runs along Cross Pointe Way													
SC 12A	On Stonehedge Trail Ln													
SC 13	Backside of Cross Pointe Way													
SC 14	On Meadow View Ln													
SC 14A	Between Meadow View Ln and Leo (by JEA)													
SC 15	Runs along hole 2 and 3													
SC 16	Center of Hole 12 along St. Johns Golf Dr.													
SC 17	Behind Hole 7 closest to entry on Meadow Ln View													
SC 19	Center of Hole 7 on Eagle Point													
SC 20	Behind Hole 12 tee box on Forest Glen Way													
SC 21	By Hole 4 on Eagle Point													
SC 23	By Hole 6 and Glenfield Crossing													
SC 24	Runs through hole 6 & behind hole 5 between Eagle Point & Glenfield Crossing													
SC 24A	On Left Glenfield Crossing													
SC 24B	On right side of Glenfield Crossing and hole 6													
SC 25	Back of Crested Heron Way													
SC 25A	Back of Fox Tail Ct.													
SC 26	Back of Hampton Crossing Way													
Complaints Received:														0








# COPY MAINTENANCE AND ACCOUNTABILITY

We use multiple software platforms for work orders and accountability based on the size of the community. The software can be integrated into our website directly or used manually by staff and vendors to start, track and complete work orders. This allows us to report the work, track time, show pictures and hold all parties responsible for completion of work.

☒ PICTURES



 VENDORS

 Vesta Property Services

**Time & Cost Tracking**  
*No time entries or costs recorded*

Daily Pool Maintenance Checklist #2302706

Daily pool maintenance and chemical readings

Chlorine level\*

The meter will be selected in the work order.

PH level\*

The meter will be selected in the work order.

Total Alkalinity level\*

The meter will be selected in the work order.

Cyanuric Acid level\*

The meter will be selected in the work order.

Calcium Hardness level\*

The meter will be selected in the work order.

Daily Pool Maintenance Checklist #2302706

Flow GPM\*

The meter will be selected in the work order.

☐ Filters Clean\*

☐ Pool Gutters Clean\*

☐ Pool clean, vacuum/skim as needed\*

☐ Sheppard's hook, life rings and skimmer in are in proper working condition\*

# of Patrons:

Notes

Checklist Photos\*

Amenity Center Daily Checklist #2331008

Daily Inspection of Amenity Center

☐ Open restrooms

☐ Open fitness center

☐ Pickup trash and debris at the amenity center, playgrounds, basketball courts, dog parks as needed

☐ Pickup trash and debris around entryway monuments and common areas as needed

☐ Blow off all areas of the amenity center & walkways as needed

☐ Ensure all stormwater drains around the amenity center are free of leaves and debris

**Section #1**

Notes


Checklist Photos\*




# COPY MAINTENANCE AND ACCOUNTABILITY

## Pool Chemical Readings - Cross Creek North

June 1, 2025 - July 22, 2025

 Export to Excel


Date	Work Order ID	Technician	Main Pool Chlorine	Main Pool pH	Lap Pool Chlorine	Lap Pool pH	Splash Pad Chlorine	Splash Pad pH	Notes
06/26/2025	#43	Leniel Feliz	No data	No data	No data	No data	No data	No data	Daily maintenance completed.
06/27/2025	#44	Leniel Feliz	No data	No data	No data	No data	No data	No data	Daily maintenance completed.
06/30/2025	#75	Leniel Feliz	No data	No data	No data	No data	No data	No data	Daily maintenance completed.
07/01/2025	#78	Leniel Feliz	2.0	7.8	10.0	7.4	10.0	8.0	Pools cleaned, equipment checked.
07/02/2025	#88	Leniel Feliz	1.0	7.6	10.0	7.4	2.0	7.6	Pools cleaned, equipment checked.
07/03/2025	#95	Leniel Feliz	1.0	7.6	10.0	7.4	3.0	7.4	Pools cleaned, equipment checked.
07/04/2025	#114	Leniel Feliz	10.0	7.6	3.0	7.6	10.0	8.0	Pools cleaned, equipment checked.
07/07/2025	#116	John Williams	0.0	8.0	1.0	7.6	10+	7.8	Let chlorine run manually for lap pool and main pool while unplugged for 3hrs from adding bicarb. Unplugged splash pad. Will adjust controllers after plugging back in.
07/08/2025	#120	Leniel Feliz	3.0	7.6	3.0	7.4	3.0	8.0	Pools cleaned, equipment checked.
07/09/2025	#130	Leniel Feliz	5.0	7.6	7.5	7.8	10.0	8.0	Pools cleaned, equipment checked.
07/10/2025	#136	Leniel Feliz	1.0	7.0	10.0	7.6	10.0	7.0	Added chemical and backwash.
07/11/2025	#151	Leniel Feliz	10.0	7.4	7.5	7.4	10.0	8.0	Splash wasn't feeding acid, fixed it. Lower chlorine on the controller.
07/14/2025	#158	John Williams	10.0	7.6	7.5	7.4	P	7.0	Shocked main pool and splash pad. Draining main pool to bring down CYA.
07/15/2025	#159	John Williams	5.0	7.6	3.0	7.4	1.0	7.6	Pools cleaned, equipment checked.
07/16/2025	#171	John Williams	10.0	7.6	5.0	7.4	1.0	7.8	Pools cleaned, equipment checked.
07/17/2025	#176	John Williams	10.0	7.6	5.0	7.6	1.0	7.8	Adjusted dials on steners for splash pad.
07/18/2025	#183	John Williams	10.0	7.6	5.0	7.8	1.0	7.8	Added CYA to all pools.
07/21/2025	#186	John Williams	5.0	7.6	10.0	7.6	5.0	7.6	Did a phosphate treatment on the main pool and splash pad.



### MaintainX

**BENEFITS**

- Interact: Work Order Management.** Create, assign and monitor work orders in real time. Assign tasks, track progress, and complete repairs. Also track maintenance history and labor time.
- External Vendor Coordination.** Streamline communication and billing with trusted service providers such as landscaping and pool maintenance contractors as well as other in-scope or complementary projects.
- Daily Digital Checklists.** Develop and maintain standardized checklists for inspection, staff, maintenance tasks, and management tasks to ensure tasks are completed consistently and quality standards are maintained.
- Reporting.** Provide detailed in summary reports for internal purposes and trends. Photos, attachments and comments can be included.
- Asset Inspection Management.** Schedule and document regular inspections of community facilities and equipment to ensure compliance and identify maintenance needs proactively.




### MaintainX

**FEES**

- Full Fee:** Unlimited access to all components. Management software, cloud storage, staff, \$100 per user.
- Operator:** Limited capability but adequate. Maintenance technicians and facility staff, \$300 per user.

Users	License Discount %	Discounted Price/Year
0-10	10%	\$520
11-24	15%	\$550
25-49	20%	\$670
50-99	25%	\$841
100+	30%	\$1042

Typical installation services: 2 days (up to 4 users), 1 maintenance visit and 1 first visit (Operator) \$4,750 annually



### WORK ORDER SUMMARY REPORT - JULY 2025

(1) with maintenance completed from 06/01/25 to 07/22/25. All work orders were completed by maintenance staff (John Williams and Leniel Feliz).

**Preventive Maintenance (45% of orders)**

- Daily chemical checks and pool maintenance - (chlorine, cyanuric acid, pH, total alkalinity, and calcium hardness)
- Equipment maintenance - Filter cleaning, backwashing, chemical dosing, pump and motor maintenance
- Regular inspections - (sanitizer levels, pool treatment, and equipment checks)

**Responsive Maintenance (55% of orders)**

- Pool and water features - (equipment repairs, filter issues, water level checks)
- Pooling maintenance - (pooling problems, chemical imbalances, equipment issues)
- Equipment repairs - (pump repairs, filter issues, and equipment issues)
- Structural maintenance - (fence repairs, gate repairs, and equipment issues)

**Key Facility Areas Served**

**Aquatics**

- Main Pool, Lap Pool and Splash Pad daily monitoring
- Backlog Filter cleaning and backwash reports
- Chemical inventory tracking (chlorine, pH, and equipment)

**Amenity Center**

- Daily equipment maintenance and repairs
- Pool and equipment
- Equipment repairs and general cleaning
- Weekly chemical and equipment maintenance

**Common Grounds**

- Pool maintenance (multiple sites)
- Landscaping (multiple sites)
- Pool maintenance (multiple sites)
- Landscaping (multiple sites)

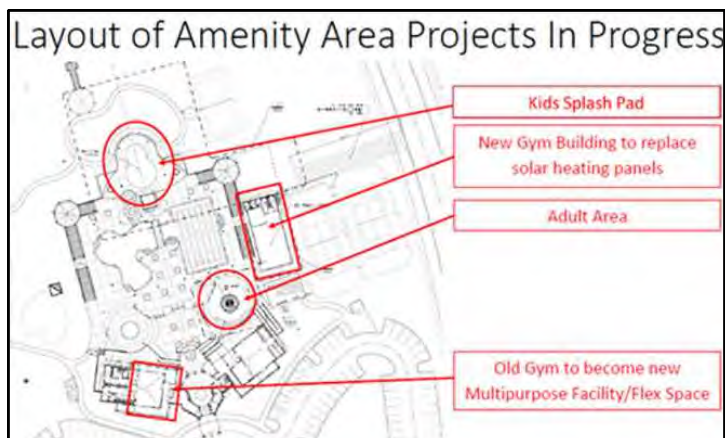
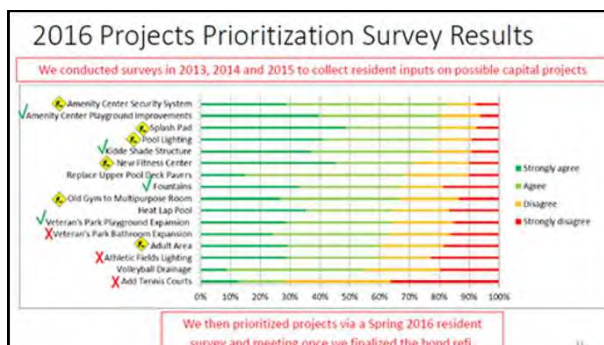




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## PROJECT MANAGEMENT

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



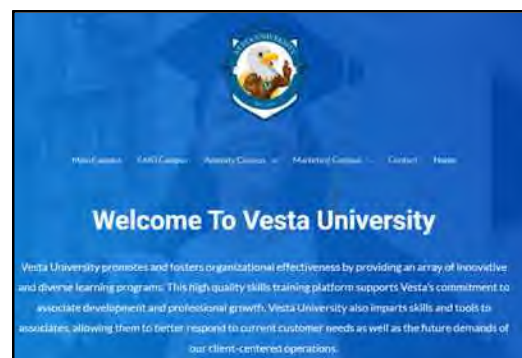
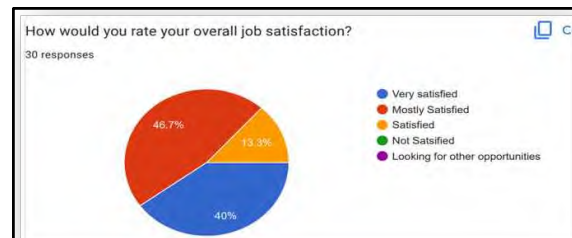
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## TEAM MEMBER DEVELOPMENT

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

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

- We also provide timely feedback through our **semi-annual check-ins**, which evolved from previous performance management reviews to a less formal, more frequent and empowering experience.
- We solicit manager feedback via **annual surveys** to ensure we are fully engaging, empowering and satisfying our onsite leadership teams.
- Most importantly, we actively foster our culture based upon our Vesta Core Values. One way we do this is through our annual "**Eagle Pride Day**".
- **Vesta University** is our website-based training resource that provides third party vendor training aids as well as internally created Vesta-specific content developed by our subject matter experts. These training aids vary from videos to PowerPoint critical skill modules.





# COPY

## TEAM MEMBER DEVELOPMENT

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

Some of our recent agenda topics have included the following:

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



“

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

Marty and Mimi Kaufman, Northeast Florida CDD Residents

”

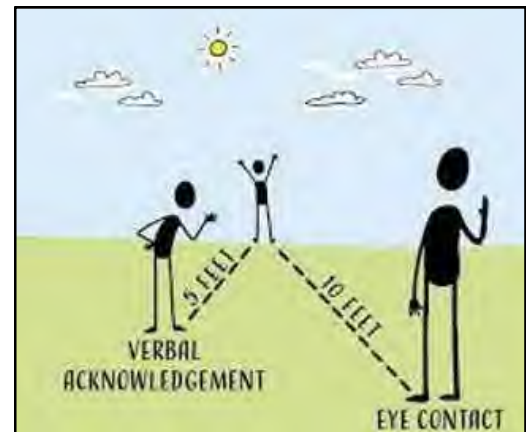
# COPY CUSTOMER SERVICE

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

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

Some of our training topics include the following:

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



“

*I'm very grateful for your stewardship that has supported and improved our community in so many ways. I'm thankful for our partnership with Vesta and the individual relationships I've built with each member of your team.*

*It is a group committed to our success, with a willing spirit that consistently goes above and beyond to serve our residents.*

Chris Sexton, former Board Chairman; Julington Creek Plantation CDD

”



# 2025 Benefits at a Glance



## MEDICAL

**HDHP Plan**—A high deductible health plan that is compatible with a Health Savings Account (HSA). This plan offers in and out-of-network coverage and employer contributions to the HSA.

**HMO Core**—Copays for common services such as primary care visits, specialists, urgent care and emergency room. Must receive care in the state of Florida.

**HMO Plus**—Lowest deductible and out-of-pocket maximum with copays on common services. Must receive care in the state of Florida.



## VISION

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



## VOLUNTARY BENEFITS

**Accident**—High and low option. Receive payment when you or a covered dependent experience an unplanned emergency such as fractures, dislocations, burns.

**Critical Illness**—Receive payment if you or a covered dependent are diagnosed with a critical medical condition such as cancer, heart attack, stroke.

**Hospital Indemnity**—Receive payment if you or a covered dependent are admitted to the hospital for an unexpected medical emergency.



## DISABILITY BENEFITS

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



## PET DISCOUNT PLAN

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



## DENTAL

**Dental HMO**—Lowest cost plan with copays for dental procedures. Services can only be rendered through in-network providers.

**Dental PPO Low**—Receive services from in or out-of-network providers. Ortho coverage is not included.

**Dental PPO High**—Receive services from in or out-of-network providers. This plan has a higher benefit maximum and lower coinsurance. Ortho is included for children and adults.



## LIFE INSURANCE

Basic Life and AD&D coverage is provided in the amount of 1 x your basic annual earnings up to \$50,000. Over 65 age reductions apply. **This is provided to you at no cost!**

Employees can purchase additional life insurance for themselves and eligible dependents. New hires can elect coverage up to the guarantee issue limit without having to submit a medical questionnaire.



## SPENDING ACCOUNTS

Contribute pre-tax dollars to a spending account that assists with paying for eligible medical expenses.

A Flexible Spending Account (FSA) is compatible with the HMO Core or HMO Plus plan and a Health Savings Account (HSA) is compatible with the HDHP Plan. HSA enrollment includes employer contributions!

Contribute pre-tax dollars to a Dependent Care Flexible Spending Account to pay for eligible childcare expenses.



## LEGAL

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



## 401K PLAN

Available to eligible employees after 3 months of employment. For more information and to enroll in the plan, log onto [www.paychexflex.com](http://www.paychexflex.com) or call Paychex at 877.244.1771.







# SCOPE OF WORK





## **5. GENERAL DESCRIPTION OF FACILITIES TO BE MANAGED**

The District consists of approximately 1,023 acres of land located entirely within Osceola County, Florida. The District owns, operates and maintains various common areas, stormwater ponds and infrastructure, lakes and roadways, sidewalks, hardscaping, water, and landscaping and irrigation systems (collectively, including the Amenity Facilities described below the "Facilities"). Specifically, the District's amenity and park Facilities include the following, together with their appurtenant areas, facilities, equipment, and other appurtenances (collectively, the "Amenity Facilities"):

- Swimming Pool Facilities (Swim Club and Ashley Park Pools; Splash pad)
- Harmony Town Square (Town Center Park)
- Lakeshore Park (sport fields, courts and pavilion)
- Community Garden
- Neighborhood Parks
- Docks, Piers and Boats at Buck Lake
- Dog Parks

Currently, ~~Inframark, LLC~~ provides District Management Services, Amenity Management Services and Field Management and Maintenance Services. The management and maintenance contracts currently in effect are public records and can be obtained by contacting: Jennifer Goldyn at [publicrecords@inframark.com](mailto:publicrecords@inframark.com). Information regarding the Harmony CDD including but not limited to the budgets can be found on the District's website at [www.harmonycdd.org](http://www.harmonycdd.org). Additional information regarding the District can be found at the website <https://www.historicalharmony.info/>; provided however, Proposers are informed that this website is not maintained by the District and therefore the District does not guarantee its accuracy or completeness. Proposers should familiarize themselves with the District's lands and Facilities prior to submitting a proposal.

The ultimate agreement or agreements entered into for the services described herein will provide that the Contractor is not entitled to bill for hours contemplated by the agreement or agreements but not staffed.

**6. SCOPE OF FIELD MANAGEMENT AND MAINTENANCE SERVICES NEEDED**

The District desires to ensure accountability and efficiency by having one individual responsible designated as responsible for overseeing Field Management and Maintenance Services.

1. Manage all maintenance and amenity operations for the District, and do so in compliance with all applicable laws, ordinances, codes, District rules and District policies;
2. Manage the entire field management and maintenance staff to ensure mission completion, and oversee workplace operations to maintain and improve effectiveness and efficiency;
3. Available twenty-four hours a day, seven days a week to handle emergencies with a phone response time of no more than thirty minutes and no more than two hours to arrive on site if needed on site;
4. Assisting the District's Buck Lake Advisory Committee;
5. Oversee and ensure continuous and consistent District-related communications for residents (including board meetings, common property issues, etc.); interact with residents and guests on a day-to-day basis;
6. Train all staff to treat residents and guests with respect and to provide the best possible customer service to residents and guests to ensure a safe and comfortable environment;
7. Manage and execute the field management and maintenance budget adopted by the Board and provide monthly updates of all related expenditures;
8. Ensure Facilities are in good and safe condition for residents at all times;
9. Report any major issues or cost overruns promptly to the District Manager and the District Board Chair;
10. Ensure all subcontracts and outside vendors meet all contract terms and conditions as outlined, provide quality services, and evaluate their performance (including, but not limited to, janitorial, security, lifeguard, lake maintenance, and landscape maintenance);
11. Oversee the District's landscape maintenance contractor and arborist, including approving contractor monthly and weekly plans, validating work performed meets contract requirements, approving invoices from the vendors after determining that the goods or services were received in good condition, and confirming all landscaping meets District Landscape Standards including ensuring trees remain healthy and pruned/trimmed, dead trees are replaced



JOB  
SCOPES

- quickly, all shrubs and flowers are kept healthy and replaced as needed, all sod remains healthy and is replaced quickly when needed, all mulched areas are kept clean of debris and trash and irrigation systems are fully functional;
12. Developing, executing, updating and publishing the Harmony CDD Landscaping Standards each year;
  13. Oversee the District's aquatic plant maintenance contractor, including approving any invoices from the vendors after determining that the goods or services were received in good condition and consistently monitor all community ponds for algae and seepage/bank issues;
  14. Oversee the District's contractors performing emergency repairs and other services, including approving any invoices from the vendors after determining that the goods or services were received in good condition and coordinate emergency repairs (e.g., broken sprinkler heads, broken or lifted sidewalks, etc.);
  15. Negotiate purchasing and potential bidding of contracted services, process and manage work orders, as needed, and review all invoices.
  16. Present professional "to the point" updates at each District board meeting to include expenditures, key issues, suggestions for improvements, etc.;
  17. Monitor and enforce the District's written rules and policies, including its Rules and Policies (2019), as it is updated from time-to-time (the "Amenity Rules"), as well as ensuring all personnel are familiar with the Amenity Rules;
  18. Document all complaints, injuries, and maintenance issues in a specified logbook and report all issues to the District Manager and/or District Counsel, as appropriate or necessary;
  19. Report major repairs to District property and Facilities (outside of landscape contract) in a timely manner and coordinate such repairs;
  20. Report professionally at each District Board meeting with monthly management report and with status of all repairs completed, and provide suggestions of key items needed to enhance the community;
  21. Assess and advise the District of any necessary repairs, extraordinary cleaning, or replacement items that may be required due to "normal wear and tear," "acts of God," or vandalism, and secure cost estimates for same;
  22. Recommend and implement (where applicable) on an ongoing basis, capital equipment replacements, additions, and operational improvements;
  23. Provide monthly written reports summarizing operations and participation levels, and describing any other areas or items of interest pertinent to the Amenities;
  24. Prepare an estimated annual operating budget by April 15, including both anticipated revenues and expenses, for the District;

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## JOB SCOPES

25. Have expansive knowledge of Microsoft Outlook, Word, Excel, Power Point; and
26. Provide, implement and administer a computer-based tracking system for maintenance tasks, whether generated by management, board members or residents, which is accessible by board members at all times. At a minimum, the system shall include the date the maintenance item was requested or brought to the attention of management, the source of the maintenance concern and contact information if a resident, the schedule for completion of the maintenance task, the date the maintenance task was completed, and the date the resident or board member was notified of completion of the maintenance task (if requested by a resident or board member);
27. Log resident contacts into the computer based tracking system established by the District Manager, and coordinate with the District Manager regarding same;
28. Responsible for day-to-day operations, development and execution of standard operation policies and procedures;
29. Supervise any staff hired by Contractor or the District necessary to perform the Maintenance Management duties contained herein;
30. Maintain and manage preventative maintenance records, inventories, purchases, warranties, regular maintenance and inspections for the Facilities, as needed including fire inspections, pest control, mechanical systems, security alarms;
31. Oversee maintenance and operation of the security systems and structures installed at the Facilities, and respond to calls and other items from the security provider;
32. Respond to and document any incident or accident reports that occur at the Amenity Facilities, and forward them appropriately;
33. Administer the card access program for residents, guests and others using the District's Amenity Facilities, including checking patron access cards, ensuring new patrons execute applicable forms, and monitoring the District's guest and visitor policies all in accordance with the District Amenity Rules;
34. Provide orientations for new patrons using the Amenities Facilities, including any Amenities equipment;
35. Administer temporary suspensions of privileges to use the amenity facilities in accordance with the District's Amenities Rules.
36. Recommend, and prepare if requested, up-to-date rules and policies for the Amenities, and make suggestions for new or revised rules for the Amenities when appropriate;
37. Develop and implement, in consultation with, and to the satisfaction of, the District, an emergency action plan setting forth a policy for the Amenities



JOB  
SCOPES

- designed to protect staff and authorized patrons from serious injury, property loss, or loss of life, in the event of an actual or potential major disaster;
38. Maintain up-to-date information on the community website.
39. Manage and operate the Amenities Facilities to provide a high-quality experience for patrons with a hospitality focus; consistently and effectively creates a flexible and interactive lifestyle for Amenities Facilities patrons;
40. Manage and hire personable, articulate, well-groomed and highly motivated individuals as needed for tasks outlined herein and select events throughout the year;
41. Provide seamless day-to-day Amenities Facilities operation creating a comfortable and safe environment;
42. Oversee and develop boating activities at Buck Lake Dock and Boathouse, and be responsible for maintenance of equipment; administrating the Online Resident Boat Reservation System; administrating the Online Resident Boat Reservation System;
43. Maintain an inventory of, and order and stock, when necessary, supplies and equipment for the operation of the Amenities;
44. Establish and maintain tracking and reporting procedures for use of the Amenities Facilities use, including daily and monthly use, and trends in use
45. Managing staff, if any, for Swim Amenities, in order to:
- deliver the services associated with the Swim Amenities at a level consistent with the District's annual budget; and
  - ensure that the District's operation and maintenance of the Swim Amenities are in compliance with all requirements of applicable law, including but not limited to Florida's Public Pool Code, Chapter 64E of the Florida Administrative Code, as well as any County-approved safety plan(s).
46. To the extent required by law and requested by the District, the Contractor shall employ lifeguards who have the current requisite certificate from the American Red Cross (or an acceptable alternative from another provider), undergo periodic in-service training and otherwise meet any other legal requirements, and maintain documentation of such certification and training.
47. Contractor shall promptly investigate and provide a full written report as to all accidents or claims for damage relating to the Swim Amenities, including any injuries or damage or destruction of property, and shall cooperate and make any, and all reports required by any insurance company or the District in connection therewith.
48. Arranging for maintenance and repair of fleet of vehicles/equipment, and replenishing gas and diesel, to minimize downtime;

49. Managing and controlling the resident Pool/Dock Access ID Card System;
50. Maintaining and emptying dog potty stations throughout the week;
51. Maintaining all sidewalks for which the CDD is responsible, including power washing and grinding;
52. Maintaining the cleanliness of the 192 median (i.e., removing road debris, etc.);
53. Supervise overall maintenance of all District Ponds and Conservation Areas;
54. Maintain all Facilities, including both parks, common areas, etc.; complete minor repairs to the Amenity Facilities for plumbing, electrical, interior and exterior painting, fence paint touch-up, clean gutters, entrance/exit gates, etc.;
55. Responsible for daily repairs to and upkeep of all District common areas, including trash pick-up around the community;
56. Repair equipment as able and promptly report the need for any repairs not able to be performed; monitor condition of all doors, adjoining fencing and gates, and resolve any problems, either through repairs or adjustments, or securing services of door/gate contractor; touch-up painting as needed; control cobwebs and prevent other debris from accumulating on exterior walls; and replace interior lights and air conditioner filters as needed. (Contractor shall be reimbursed by the District for the purchase of replacement light bulbs and air conditioning filters upon presentation of support for such reimbursement to the District's satisfaction);
57. Survey all community light structures weekly and replace as needed or call utility provider for replacement of major community lights;
58. Monitor all roads for potholes or drainage issues, sidewalks, curbs, street signs, monuments, and informational signs, and report to the appropriate groups for repair;
59. Pressure wash all pool decks, monuments, hardscape, curbs, sidewalks, sports courts at least twice per year, or more often if needed;
60. Empty waste receptacles and pick up debris around all entrances, swimming pool decks, parks, playgrounds, and sports courts.
61. Maintain swimming pool decks by blowing off entire pool deck and splash pad, and arranging furniture, adjusting umbrellas, and cleaning grills (if provided).



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62. Oversee and maintain community parks, dock, and watercraft operations by managing reservations, checking condition of deck, storage bins, etc., and training residents for proper operation of the District watercraft.
63. Clean all outdoor furniture.
64. Maintain and assess playground equipment for safety issues on a regular basis.
65. Daily general inspection of the Amenities Facility at both (i) the beginning of each day, which shall include but not be limited to, picking up loose trash, inspecting for property damage, arranging furniture, ensuring that door locks and/or gate latches are secure and functional, ensuring that any equipment is clean, functional, and free from safety hazards; and (ii) at the end of each day, which shall include but not be limited to, ensure all doors and windows are secure, and the card access system is engaged, and ensure that the gate latches are secure at the pools, and other facilities;
66. In the event of forecasted inclement weather, secure outdoor furniture and take other appropriate steps to help prevent loss and damage.
67. Maintain the general appearance of all indoor spaces by vacuuming, dusting, furniture positioning, cleaning all tiled areas and cleaning windows and bathrooms.
68. Window cleaning includes window ledges and blinds.
69. Bathroom cleaning includes – but is not limited to - all toilets, bases behind toilets, counters, mirrors and shower stalls. Soap dispensers shall be cleaned and filled when necessary. Paper product dispensers shall be restocked as needed (costs of paper products and soap shall be included in the flat annual fee proposal.)
70. Dusting includes window ledges and blinds, furniture, baseboards, countertops and lights.
71. Cleaning of tiled areas includes dust mopping, damp mopping and baseboards.
72. Storage closets shall be kept in an orderly condition. Equipment and cleaning supplies shall be properly labeled and stored.
73. District shall furnish the necessary cleaning equipment and supplies for the provision of the janitorial services described herein. Should extraordinary cleaning services be required (as agreed to in writing by the District Board or District Manager), such special janitorial services and/or equipment/supplies shall be billable to the District.

JOB  
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74. Contractor shall be responsible for Swim Amenities to be maintained to be safely used by patrons, enforcing the Amenities Rules, performing light pool area cleaning, managing pool staff, if any, and handling phone calls. The Proposer shall ensure the staffing schedule includes one employee to be onsite until 30 minutes after pool closure, seven (7) days per week.
75. Responding to first aid situations
76. Provide a Certified Pool Operator.
77. Check pool water quality and complete equivalent to DH Form 921 3/98 Swimming Pool Report, as required by Chapter 64E-9.004(13), FAC, per site visit.
78. Conduct necessary tests for proper pool chemicals as required in order to maintain water quality levels within requirements of Chapter 64E-9.004(1)(d).
79. Operate filtration and recirculation systems, backwashing as needed. Clean all strainers. Maintain pool at proper water level, and maintain filtration rates. Check valves for leaks, as well as other components, and maintain in proper condition.
80. Manually skim, brush and vacuum pools a minimum of three (3) days per week, or as needed.
81. Advise the District of any necessary repairs, cleaning, or replacement items required due to "normal wear & tear," "acts of God," or vandalism. Such repairs shall be billed separately, upon approval of the District Board or District Manager.
82. All chemicals required for cleaning the pools, including, but limited to, special treatment of stains, metals sequestering, foam removal, oil removal, phosphate and nitrate removal, mustard and black algae treatment, and super chlorination, shall be used as needed and billed separately. Additional service and/or chemicals required due to natural disasters or gale-force winds (or stronger) shall be billed separately as well. The District shall purchase directly, all pool chemicals necessary to comply with the above.
83. Provide a dedicated commercial-duty pool vacuum kept on site to provide improved response by on-site staff in the event of emergencies, at no additional cost to the District.
84. The Contractor shall conduct visual inspections daily of all pool equipment, devices, splash pad, restrooms, and lighting.



## **6. SCOPE OF FIELD MANAGEMENT AND MAINTENANCE SERVICES NEEDED**

The District desires to ensure accountability and efficiency by having one individual responsible designated as responsible for overseeing Field Management and Maintenance Services.

1. Manage all maintenance and amenity operations for the District, and do so in compliance with all applicable laws, ordinances, codes, District rules and District policies;
2. Manage the entire field management and maintenance staff to ensure mission completion, and oversee workplace operations to maintain and improve effectiveness and efficiency;
3. Available twenty-four hours a day, seven days a week to handle emergencies with a phone response time of no more than thirty minutes and no more than two hours to arrive on site if needed on site;
4. Assisting the District's Buck Lake Advisory Committee;
5. Oversee and ensure continuous and consistent District-related communications for residents (including board meetings, common property issues, etc.); interact with residents and guests on a day-to-day basis;
6. Train all staff to treat residents and guests with respect and to provide the best possible customer service to residents and guests to ensure a safe and comfortable environment;
7. Manage and execute the field management and maintenance budget adopted by the Board and provide monthly updates of all related expenditures;
8. Ensure Facilities are in good and safe condition for residents at all times;
9. Report any major issues or cost overruns promptly to the District Manager and the District Board Chair;
10. Ensure all subcontracts and outside vendors meet all contract terms and conditions as outlined, provide quality services, and evaluate their performance (including, but not limited to, janitorial, security, lifeguard, lake maintenance, and landscape maintenance);
11. Oversee the District's landscape maintenance contractor and arborist, including approving contractor monthly and weekly plans, validating work performed meets contract requirements, approving invoices from the vendors after determining that the goods or services were received in good condition, and confirming all landscaping meets District Landscape Standards including ensuring trees remain healthy and pruned/trimmed, dead trees are replaced

- quickly, all shrubs and flowers are kept healthy and replaced as needed, all sod remains healthy and is replaced quickly when needed, all mulched areas are kept clean of debris and trash and irrigation systems are fully functional;
12. Developing, executing, updating and publishing the Harmony CDD Landscaping Standards each year;
  13. Oversee the District's aquatic plant maintenance contractor, including approving any invoices from the vendors after determining that the goods or services were received in good condition and consistently monitor all community ponds for algae and seepage/bank issues;
  14. Oversee the District's contractors performing emergency repairs and other services, including approving any invoices from the vendors after determining that the goods or services were received in good condition and coordinate emergency repairs (e.g., broken sprinkler heads, broken or lifted sidewalks, etc.);
  15. Negotiate purchasing and potential bidding of contracted services, process and manage work orders, as needed, and review all invoices.
  16. Present professional "to the point" updates at each District board meeting to include expenditures, key issues, suggestions for improvements, etc.
  17. Monitor and enforce the District's written rules and policies, including its Rules and Policies (2019), as it is updated from time-to-time (the "Amenity Rules"), as well as ensuring all personnel are familiar with the Amenity Rules;
  18. Document all complaints, injuries, and maintenance issues in a specified logbook and report all issues to the District Manager and/or District Counsel, as appropriate or necessary;
  19. Report major repairs to District property and Facilities (outside of landscape contract) in a timely manner and coordinate such repairs;
  20. Report professionally at each District Board meeting with monthly management report and with status of all repairs completed, and provide suggestions of key items needed to enhance the community;
  21. Assess and advise the District of any necessary repairs, extraordinary cleaning, or replacement items that may be required due to "normal wear and tear," "acts of God," or vandalism, and secure cost estimates for same;
  22. Recommend and implement (where applicable) on an ongoing basis, capital equipment replacements, additions, and operational improvements;
  23. Provide monthly written reports summarizing operations and participation levels, and describing any other areas or items of interest pertinent to the Amenities;
  24. Prepare an estimated annual operating budget by April 15, including both anticipated revenues and expenses, for the District;



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## JOB SCOPES

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26. Provide, implement and administer a computer-based tracking system for maintenance tasks, whether generated by management, board members or residents, which is accessible by board members at all times. At a minimum, the system shall include the date the maintenance item was requested or brought to the attention of management, the source of the maintenance concern and contact information if a resident, the schedule for completion of the maintenance task, the date the maintenance task was completed, and the date the resident or board member was notified of completion of the maintenance task (if requested by a resident or board member);
27. Log resident contacts into the computer based tracking system established by the District Manager, and coordinate with the District Manager regarding same;
28. Responsible for day-to-day operations, development and execution of standard operation policies and procedures;
29. Supervise any staff hired by Contractor or the District necessary to perform the Maintenance Management duties contained herein;
30. Maintain and manage preventative maintenance records, inventories, purchases, warranties, regular maintenance and inspections for the Facilities, as needed including fire inspections, pest control, mechanical systems, security alarms;
31. Oversee maintenance and operation of the security systems and structures installed at the Facilities, and respond to calls and other items from the security provider;
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36. Recommend, and prepare if requested, up-to-date rules and policies for the Amenities, and make suggestions for new or revised rules for the Amenities when appropriate;
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- designed to protect staff and authorized patrons from serious injury, property loss, or loss of life, in the event of an actual or potential major disaster;
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45. Managing staff, if any, for Swim Amenities, in order to:
- deliver the services associated with the Swim Amenities at a level consistent with the District's annual budget; and
  - ensure that the District's operation and maintenance of the Swim Amenities are in compliance with all requirements of applicable law, including but not limited to Florida's Public Pool Code, Chapter 64E of the Florida Administrative Code, as well as any County-approved safety plan(s).
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48. Arranging for maintenance and repair of fleet of vehicles/equipment, and replenishing gas and diesel, to minimize downtime;



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49. Managing and controlling the resident Pool/Dock Access ID Card System;
50. Maintaining and emptying dog potty stations throughout the week;
51. Maintaining all sidewalks for which the CDD is responsible, including power washing and grinding;
52. Maintaining the cleanliness of the 192 median (i.e., removing road debris, etc.);
53. Supervise overall maintenance of all District Ponds and Conservation Areas;
54. Maintain all Facilities, including both parks, common areas, etc.; complete minor repairs to the Amenity Facilities for plumbing, electrical, interior and exterior painting, fence paint touch-up, clean gutters, entrance/exit gates, etc.;
55. Responsible for daily repairs to and upkeep of all District common areas, including trash pick-up around the community;
56. Repair equipment as able and promptly report the need for any repairs not able to be performed; monitor condition of all doors, adjoining fencing and gates, and resolve any problems, either through repairs or adjustments, or securing services of door/gate contractor; touch-up painting as needed; control cobwebs and prevent other debris from accumulating on exterior walls; and replace interior lights and air conditioner filters as needed. (Contractor shall be reimbursed by the District for the purchase of replacement light bulbs and air conditioning filters upon presentation of support for such reimbursement to the District's satisfaction);
57. Survey all community light structures weekly and replace as needed or call utility provider for replacement of major community lights;
58. Monitor all roads for potholes or drainage issues, sidewalks, curbs, street signs, monuments, and informational signs, and report to the appropriate groups for repair;
59. Pressure wash all pool decks, monuments, hardscape, curbs, sidewalks, sports courts at least twice per year, or more often if needed;
60. Empty waste receptacles and pick up debris around all entrances, swimming pool decks, parks, playgrounds, and sports courts.
61. Maintain swimming pool decks by blowing off entire pool deck and splash pad, and arranging furniture, adjusting umbrellas, and cleaning grills (if provided).

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62. Oversee and maintain community parks, dock, and watercraft operations by managing reservations, checking condition of deck, storage bins, etc., and training residents for proper operation of the District watercraft.
63. Clean all outdoor furniture.
64. Maintain and assess playground equipment for safety issues on a regular basis.
65. Daily general inspection of the Amenities Facility at both (i) the beginning of each day, which shall include but not be limited to, picking up loose trash, inspecting for property damage, arranging furniture, ensuring that door locks and/or gate latches are secure and functional, ensuring that any equipment is clean, functional, and free from safety hazards; and (ii) at the end of each day, which shall include but not be limited to, ensure all doors and windows are secure, and the card access system is engaged, and ensure that the gate latches are secure at the pools, and other facilities;
66. In the event of forecasted inclement weather, secure outdoor furniture and take other appropriate steps to help prevent loss and damage.
67. Maintain the general appearance of all indoor spaces by vacuuming, dusting, furniture positioning, cleaning all tiled areas and cleaning windows and bathrooms.
68. Window cleaning includes window ledges and blinds.
69. Bathroom cleaning includes – but is not limited to - all toilets, bases behind toilets, counters, mirrors and shower stalls. Soap dispensers shall be cleaned and filled when necessary. Paper product dispensers shall be restocked as needed (costs of paper products and soap shall be included in the flat annual fee proposal.)
70. Dusting includes window ledges and blinds, furniture, baseboards, countertops and lights.
71. Cleaning of tiled areas includes dust mopping, damp mopping and baseboards.
72. Storage closets shall be kept in an orderly condition. Equipment and cleaning supplies shall be properly labeled and stored.
73. District shall furnish the necessary cleaning equipment and supplies for the provision of the janitorial services described herein. Should extraordinary cleaning services be required (as agreed to in writing by the District Board or District Manager), such special janitorial services and/or equipment/supplies shall be billable to the District.



74. Contractor shall be responsible for Swim Amenities to be maintained to be safely used by patrons, enforcing the Amenities Rules, performing light pool area cleaning, managing pool staff, if any, and handling phone calls. The Proposer shall ensure the staffing schedule includes one employee to be onsite until 30 minutes after pool closure, seven (7) days per week.
75. Responding to first aid situations
76. Provide a Certified Pool Operator.
77. Check pool water quality and complete equivalent to DH Form 921 3/98 Swimming Pool Report, as required by Chapter 64E-9.004(13), FAC, per site visit.
78. Conduct necessary tests for proper pool chemicals as required in order to maintain water quality levels within requirements of Chapter 64E-9.004(1)(d).
79. Operate filtration and recirculation systems, backwashing as needed. Clean all strainers. Maintain pool at proper water level, and maintain filtration rates. Check valves for leaks, as well as other components, and maintain in proper condition.
80. Manually skim, brush and vacuum pools a minimum of three (3) days per week, or as needed.
81. Advise the District of any necessary repairs, cleaning, or replacement items required due to "normal wear & tear," "acts of God," or vandalism. Such repairs shall be billed separately, upon approval of the District Board or District Manager.
82. All chemicals required for cleaning the pools, including, but limited to, special treatment of stains, metals sequestering, foam removal, oil removal, phosphate and nitrate removal, mustard and black algae treatment, and super chlorination, shall be used as needed and billed separately. Additional service and/or chemicals required due to natural disasters or gale-force winds (or stronger) shall be billed separately as well. The District shall purchase directly, all pool chemicals necessary to comply with the above.
83. Provide a dedicated commercial-duty pool vacuum kept on site to provide improved response by on-site staff in the event of emergencies, at no additional cost to the District.
84. The Contractor shall conduct visual inspections daily of all pool equipment, devices, splash pad, restrooms, and lighting.

## AFFIDAVITS

## 8.A.

**AFFIDAVIT OF ACKNOWLEDGMENTS**

STATE OF Florida  
COUNTY OF Duval

Before me, the undersigned authority, appeared the affiant, **Patti Brown**, and having taken an oath, affiant, based on personal knowledge, deposes and states:

1. I am over eighteen (18) years of age and competent to testify as to the matters contained herein. I serve in the capacity of **Director of Business Development for Vesta Property Services, Inc.** ("Proposer") and am authorized to make this Affidavit of Acknowledgments on behalf of Proposer.

2. I assisted with the preparation of, and have reviewed, the Proposer's proposal ("Proposal") provided in response to the Harmony Community Development District proposal for district management. All of the information provided therein is full and complete, and truthful and accurate. I understand that intentional inclusion of false, deceptive or fraudulent statements, or the intentional failure to include full and complete answers, may constitute fraud; and, that the District may consider such action on the part of the Proposer to constitute good cause for rejection of the proposal.

3. I do hereby certify that the Proposer has not, either directly or indirectly, participated in collusion or proposal rigging.

4. The Proposer agrees through submission of the Proposal to honor all pricing information ninety (90) days from the opening of the proposals.

5. The Proposer acknowledges the receipt of the complete Request for Proposals as provided by the District and as described in the Table of Contents, as well as the receipt of the following Addendum Numbers: \_\_\_\_\_.

6. The Proposer authorizes and requests any person, firm or corporation to furnish any pertinent information requested by the Harmony Community Development District, or its authorized agents, deemed necessary to verify the statements made in the Proposal, or regarding the ability, standing, integrity, quality of performance, efficiency, and general reputation of the Proposer.

*[Signature page to follow]*



AFFIDAVITS

Under penalties of perjury under the laws of the State of Florida, I declare that I have read the foregoing Affidavit of Acknowledgments and that the foregoing is true and correct.

Dated this 9<sup>th</sup> day of July, 2025.

Proposer: Vesta Property Services, Inc.

By: [Signature]

Title: **Director of Business Development**

STATE OF Florida  
COUNTY OF Duval

The foregoing instrument was acknowledged before me this 9th day of July, 2025, by Pat Brown of Vesta Property Services, Inc. who is personally known to me or who has produced \_\_\_\_\_ as identification, and did [☒] or did not [☐] take the oath.



KIMBERLY A. GOODWIN  
Notary Public  
State of Florida  
Comm# HH673898  
Expires 6/8/2029

[Signature]  
Notary Public, State of Florida  
Print Name: Kimberly A. Goodwin  
Commission No.: HH 673898  
My Commission Expires: 6-8-2029

## AFFIDAVITS

8.B.

**SWORN STATEMENT UNDER SECTION 287.133(3)(a),  
FLORIDA STATUTES, REGARDING PUBLIC ENTITY CRIMES**

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

1. This sworn statement is submitted to Harmony Community Development District.
2. I am over eighteen (18) years of age and competent to testify as to the matters contained herein. I serve in the capacity of **Director of Business Development for Vesta Property Services, Inc.** ("Proposer") and am authorized to make this Sworn Statement on behalf of Proposer.
3. Proposer's business address is **245 Riverside Ave, Suite 300 Jacksonville, FL 32202**
4. Proposer's Federal Employer Identification Number (FEIN) is **59-3353294**
5. (If the Proposer has no FEIN, include the Social Security Number of the individual signing this sworn statement: \_\_\_\_\_.)
6. I understand that a "public entity crime" as defined in Paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
7. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.
8. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), Florida Statutes, means:
  - a. A predecessor or successor of a person convicted of a public entity crime; or,
  - b. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate.



## AFFIDAVITS

The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

9. I understand that a "person" as defined in Paragraph 287.133(1)(e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.
10. Based on information and belief, the statement which I have marked below is true in relation to the Proposer submitting this sworn statement. (Please indicate which statement applies.)

☒ Neither the entity submitting this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, nor any affiliate of the entity, have been charged with and convicted of a public entity crime subsequent to July 1, 1989.

☐ The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members or agents who are active in management of the entity or an affiliate of the entity, has been charged with and convicted of a public entity crime subsequent to July 1, 1989, AND (please indicate which additional statement applies):

☐ There has been a proceeding concerning the conviction before an Administrative Law Judge of the State of Florida, Division of Administrative Hearings. The final order entered by the Administrative Law Judge did not place the person or affiliate on the convicted vendor list. (Please attach a copy of the final order.)

☐ The person or affiliate was placed on the convicted vendor list. There has been a subsequent proceeding before an Administrative Law Judge of the State of Florida, Division of Administrative Hearings. The final order entered by the Administrative Law Judge determined that it was in the public interest to remove the person or affiliate from the convicted vendor list. (Please attach a copy of the final order.)

☐ The person or affiliate has not been placed on the convicted vendor list. (Please describe any action taken by or pending with the Florida Department of Management Services.)



## AFFIDAVITS

Under penalties of perjury under the laws of the State of Florida, I declare that I have read the foregoing Sworn Statement under Section 287.133(3)(a), Florida Statutes, Regarding Public Entity Crimes and all of the information provided is true and correct.

Dated this 9<sup>th</sup> day of July, 2025.

Proposer: Vesta Property Services, Inc.

By: [Signature]

Title: Director of Business Development

STATE OF Florida

COUNTY OF Duval

The foregoing instrument was acknowledged before me this 9<sup>th</sup> day of July, 2025, by Patti Brown of Vesta Property Services, Inc. who is personally known to me or who has produced \_\_\_\_\_ as identification, and did X or did not [ ] take the oath.



KIMBERLY A. GOODWIN  
Notary Public  
State of Florida  
Comm# HH673898  
Expires 6/8/2029

Kimberly A. Goodwin  
Notary Public, State of Florida  
Print Name: Kimberly A. Goodwin  
Commission No.: HH 673898  
My Commission Expires: 6-8-2029

“

Vesta has done an outstanding job in adapting to the ever-changing needs of the community and our 12,000+ residents. Vesta manages the amenities in the most up-to-date manner - one that the residents are proud of. I, along with the rest of the 9-member Federation Board, highly recommend Vesta for any position for which they may be considered.

Jack Davidson, President Federation Board, Kings Point Sun City Center

”

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**FORMS**

**GENERAL PROPOSER INFORMATION**

- Proposer General Information:

Proposer Name: Vesta Property Services, Inc.

Address: 245 Riverside Avenue #300

City Jacksonville State Florida Zip Code 32202

Telephone (904) 355-1831 Fax no. (904) 204-2469

1<sup>st</sup> Contact Name: Scott Smith Title: Vice President, District Services

2<sup>nd</sup> Contact Name: Kyle Darin Title: Regional Director, District Services

Parent Company Name (if any) PMG Holdings

Street Address 5401 N. Central Expressway #290

P. O. Box (if any)

City Dallas State TX Zip Code 75205

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

1st Contact Name Jose B. Maldonado Title Treasurer

2nd Contact Name Jason Villalba Title Secretary

- Company Standing:

Proposer's Corporate Form: **Corporation**

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

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

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

If no, please explain

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

If no, please explain

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## PROPOSER INFORMATION

- What are the Proposer's current insurance limits? Please attach a copy of a current insurance certificate.
  - General Liability \$1,000,000**
  - Automobile Liability \$5,000,000**
  - Workers Compensation \$1,000,000**
  - Expiration Date 08/01/2025**
- Licensure** – Please list all applicable state and federal licenses, and state whether such licenses are presently in good standing:
  - Type of registration: Community Association Management Firm License**
  - License No. #CAB3970 Expiration Date: 09/30/2025**
  - Qualifying Individual: Lisa Ann Manzione Title: CAM / Regional President**

### PERSONNEL

- List the location of the Proposer's office which would perform work for the District.
  - Street Address : **250 International Pkwy Suite 208**
  - City State Zip Code **Lake Mary, FL 32746**
  - Telephone Fax no. **813-390-6553**
  - 1st Contact Name: **Scott Smith** Title : **Vice President, District Services**
  - 2nd Contact Name: **Kyle Darin** Title: **Regional Director, District Services**
- Officers and Supervisory Personnel – Please complete the pages that follow at the end of this Part regarding the Proposer's Officers and Supervisory Personnel, and attach resumes for any Supervisory Personnel listed.*

### OFFICERS

PROPOSER: Vesta Property Services

DATE: 7/10/2025

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

NAME	POSITION OR TITLE	RESPONSIBILITIES	INDIVIDUAL'S RESIDENCE CITY, STATE
David Surface	Chief Executive Officer	Oversees company executive and day to day operations.	Jacksonville, FL
Christine Richie	Chief Accounting Officer	Oversees company accounting.	Jacksonville, FL
Dan Armstrong	Chief Financial Officer	Oversees company financial and administrative functions.	Jacksonville, FL
Ginger Anzalone	President	Oversee all community management operations from Central, West to NE Florida.	
Lisa Manzione	President	Oversee all community management operations in South and Southeast Florida.	
FOR PARENT COMPANY (if applicable)			
John J Corona	Chairman/CEO	Oversees company executive and day to day operations.	Dallas, TX
Helen Eden Carona	EVP/CCO/Director	Oversees company executive and day to day operations.	Dallas, TX
Jason Villalba	Secretary		Dallas, TX
Jose B Maldonado	Treasurer		Dallas, TX



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## PROPOSER INFORMATION

SUPERVISORY PERSONNEL WHO WILL BE INVOLVED WITH THE WORK						
**NOTE: ATTACH RESUMES OF INDIVIDUALS LISTED BELOW**						
PROPOSER: <u>Vesta Property Services</u>				DATE: <u>7/17/2025</u>		
INDIVIDUAL'S NAME	PRESENT TITLE	JOB RESPONSIBILITIES	OFFICE LOCATION	% OF TIME TO BE DEDICATED TO THIS PROJECT	YEARS OF EXPERIENCE IN PRESENT POSITION	TOTAL YEARS OF RELATED EXPERIENCE
Field Operations Manager	FOM	Oversee all maintenance and field operations	Harmony	100%	4 Years	10 Years

**Vesta is prepared to retain current on site staff if interested and available. However, Vesta is willing and capable of hiring outside staff if needed. See resume on next 3 pages of proposed Field Operations Manager.**

• Subcontractors – Does the Proposer intend to use any subcontractors in connection with the work? Yes      No **X** For each subcontractor, please provide the following information (attach additional sheets if necessary):

• Security Measures - Please describe any background checks, drug tests or other security measures that were taken with respect to the hiring and retention of the Proposer's personnel who will be involved with this project, and provide proof thereof to the extent permitted by law:

**Vesta runs a comprehensive state and federal background check on all new hires prior to final onboarding through our third-party provider, Screening One. Additionally, all new hires are required to successfully complete a 7-panel drug test prior to Day 1. Finally, we participate in all federal and state mandated I9 and E-Verify requirements to ensure work authorization/eligibility meets compliance standards.**

## Field Operations Manager

### Objective

My goal is to maintain motivation, dedication and passion in my profession. I wish to advance in my career while furthering the success of the company. I strive to be well organized and use my time wisely to benefit my working environment. I possess extensive years of experience in the maintenance field.

### Experience

#### Facility Ops Manager | Large Amenity Account | July 2023 – Present

- General repairs, electrical, plumbing, painting, HVAC, and carpentry.
- Maintains a file system to include logs, inventory and inspection records and prepares reports.
- Recognize work methods and procedures, which promote a safe working environment for employees and residents.
- Establish and maintain cooperative working relationships with those contacted in the course of work.
- Complete monthly inspection reports on all equipment to include, but not be limited too, generators, elevators, fire suppression pump and other necessary equipment. The inspection will also include an overview of the exterior condition of the building to include paint, stucco, expansion joints, light fixtures, doors, windows, etc.
- Meet with vendors scheduled to do maintenance on a regular basis i.e. WSA, lawn company, etc.
- Proactively greet and engage our residents and visitors across the property.
- Communicates effectively verbally and in writing.
- Maintain upkeep of all A/C units located in common areas.
- Closely monitor key box, sign out keys to vendors sent by owners, accompany vendors requested by self.
- Inventory maintenance and janitorial supplies, maintaining adequate stock.
- Maintain upkeep of all common area lights and emergency lighting.
- Maintain chemical balance at pool and spa, along with upkeep and maintenance of pool equipment.

#### Operations Manager | Del Webb Orlando | July 2022 – July 2023

- General repairs, electrical, plumbing, painting, HVAC, and carpentry.
- Plan space requirements, procure supplies and equipment, and lead a team in the installation of event materials with a focus on first-class appearance and experience for residents and guests.
- Maintain a clean and organized workspace, to include community storage garages, workshops, and vehicles.
- Inventory equipment and consumable supplies and ensure that proper amounts of supply are kept on hand at all times to meet the community's needs.
- Represent the Association and Management to external vendors who are approached to provide proposals for capital projects and improvements. Once engaged, supervise the vendor's work product to ensure it meets contractual obligations.
- Manage breakdown of event space post-event and ensure all Association-owned equipment is carefully returned to storage, with repairs made as needed for future use.
- Proactively greet and engage our residents and visitors across the property.
- Help to maintain a safe and secure environment for all residents and fellow associates.
- Always conduct business with the highest standards of personal, professional and ethical conduct.
- Mentor and coach Maintenance Technician to ensure tasks are completed in a timely and efficient manner.

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**PROPOSER  
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**Facilities Manager | The Grove Resort & Water Park | June 2021 – July 2022**

- Professionally maintain the property and upkeep free of any deficiencies.
- Maintain a PM log that verifies that each unit has had a proper PM and has been inspected.
- Ensure the level of quality with respect to the physical structure and operational requirements.
- Ensure the department has adequate supply to meet the operational needs.
- Plan, develop, and implement procedures to improve operations.
- Interface with other department heads on work priorities and activities.
- Develop and implement preventative maintenance and engineering programs.
- Always maintain a safe and secure environment for guests and employees.
- Train staff on the importance of safety to prevent injuries.
- Participate, train, and develop staff on all property emergency procedures for guests and employees.

**Senior Chief of Facilities | Liki Tiki Village | January 2019 – June 2021**

- Complete all required Company training and compliance courses as assigned.
- Adhere to Company standards and maintain compliance with all policies and procedures.
- Interact with general/sub-contractors overseeing projects from inception to completion.
- Review production, quality control, facilities reports and statistics to plan and modify activities.
- Plan, develop, and implement procedures to improve operations.
- Interface with other department heads on work priorities and activities.
- Develop and implement preventative maintenance and engineering programs.
- Resolve employee grievances.
- Requisition tools, equipment, and supplies.

**Chief Engineer | Vacation Villas Two | October 2018- January 2019**

- Responsible for overseeing administrative functions such as safety, budgeting and personnel.
- Determines the goals of the company and practice and ensure that all SOP's are followed.
- Devise plans for each phase of the projects.
- Identifies and purchase items needed for all projects within the property.
- Recruit maintenance staff.
- Performs quality control checks, ensuring the safety and effectiveness or reliability of all equipment.
- Supervises the installation of equipment.
- Delegate tasks as necessary to engineering team.

**Maintenance Tech II | Marriott Orlando Village | August 2016 – August 2017**

- General repairs, electrical, plumbing, painting, HVAC, and carpentry.
- Solving technical issues in assistance with technical proficiency.
- Resolve guest and owner complaints on maintenance issues.
- Perform preventative maintenance work to ensure hotel quality maintenance standards are achieved.
- Monitor alarm panel and assist with trouble/fire alarms.
- Maintain the physical functionality and safety of the facility.
- Respond to guest calls and team member work orders.



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## PROPOSER INFORMATION

### **Maintenance Supervisor | Mystic Dunes Resort | July 2015 – July 2016**

- Resolve guest and owner complaints on maintenance issues.
- Prepare schedules for work to be performed.
- Evaluate work of subordinates.
- Assign work assignments to be performed.
- Follow up on work and reports to the Chief/Assistant Chief Engineer.
- Ensure department policies and procedures are followed.
- Critique all work assignments directly assigned.
- Train and develop staff.
- Provide customer service to owners, guest and departments.
- Monitor supply inventory.
- Requisition tools, equipment and supplies through Chef/Assistant Chief Engineer.
- Perform duties of subordinates.
- Perform similar and related duties as assigned.

### **Engineer Tech II | The Fountains Resort | June 2007 – July 2015**

- General repairs, electrical, plumbing, painting, HVAC, and carpentry.
- Perform preventative maintenance work to ensure hotel quality standards are achieved.
- Refurbish furniture and fixtures with paint/ stain.
- Solving technical issues in assistance with technical proficiency.
- Maintain the physical functionality and safety of the facility.
- Respond to guest and team member work orders.
- Inspections for preventative maintenance needs.
- Record and report completed repairs that require further attention.
- Monitor alarm panel and assist with trouble/ fire alarms.
- Respond to guest calls and team member work orders.

## **EDUCATION**

- Sandford School | Skokie, IL | GED
- Florida Technical Collage Network Administrator Kissimmee, FL

## **CERTIFICATIONS**

- EPA
- CPO
- OSHA 30

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**PROPOSER  
INFORMATION**

- Has the Proposer, or any of its principals or supervisory personnel (e.g., owner, officer, or supervisor, etc.), been terminated for cause from any district management, amenity center management and/or grounds maintenance management contract within the past 3 years? Yes \_\_X\_\_ No \_\_\_\_\_ For each such incident, please provide the following information (attach additional sheets as needed):

- **Project Name/Location: Harbor Bay CDD ("MiraBay")/ Apollo Beach, FL**
- **Contact: Daniel Leventry Contact Phone: (813) 995-5669**
- **Project Type/Description: CDD of 1,300 homes (almost built-out)**
- **Dollar Amount of Contract: \$750,000**
- **Scope of Services for Project: Amenity Management, Field Operations**
- **Management, Facilities Maintenance Services, Cafe Operations, and**
- **Lifestyle Programs.**
- **Dates Serviced: December, 2019 – Present**

- **Project Name: Triple Creek CDD / Location: Riverview, Florida**
- **Contact: Alex Garces (Chair) Email: boardmember5@triplecreekcdd.com**
- **Project Type: Planned-community of 1,200+ homes**
- **Scope of Services: Amenity Mgt., Maintenance Services, Lifestyle Programs**
- **Contract Value: \$110,000+**
- **Dates Serviced: 2021 – Present**

- Please state whether or not the Proposer or any of its affiliates are presently barred or suspended from bidding or contracting on any state, local, or federal contracts? Yes\_\_ No X

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**PROPOSER  
INFORMATION**

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

**None**

- *List any and all litigation to which the Proposer or its principals have been a party in the last five (5) years. Please describe the nature of the litigation, the Proposer's role in the litigation, and the status and/or resolution of the litigation.*
- ***At our "Five Towns" managed community in the St. Petersburg area, a resident alleged a type of "slip-and-fall," supposedly resulting from an insect sting occurring on the club premises/facilities that we maintain. The claim was dismissed.***
- ***A former employee at our Kings Point Sun City Center property alleged wrongful termination in lieu of receiving severance pay (contrary to our standard employment practice.) The claim was dismissed.***
- ***A former Vesta employee alleged age-discrimination as the reason for his or her termination at our Villages of Bloomingdale contact in Riverview. The claim was settled (for a modest sum) out of court on May 21, 2021***
- ***The majority of litigation we are involved with are handled by Association insurance as required by our agreements since Vesta is frequently added to litigation when it is not responsible for the claims made***





# REFERENCES & QUESTIONS





## REFERENCES

- Please provide the following information for each project that is similar to this project, and that you are currently undertaking, or have undertaken, in the past five years. (attach additional sheets if necessary; if there are more than five projects that are responsive, please provide the information requested for the five most similar to the Harmony CDD):

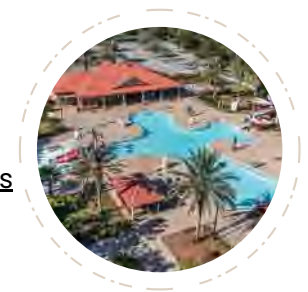
Project Name/Location: **Julington Creek Plantation CDD**  
 Contact: Michael Morton Contact Phone: 856-392-2245  
 Project Type/Description: CDD of 5,800 homes (built-out)  
 Dollar Amount of Contract: \$1,650,000 (+ Cafe w/ \$185K in annual sales)  
 Scope of Services for Project: Amenity Management & Staffing, Field Operations Management, Facility Maintenance Services, turnkey Café Operation, Lifeguard Staffing, and Lifestyle Programs & Events.  
 Dates Serviced: 2017 – Present



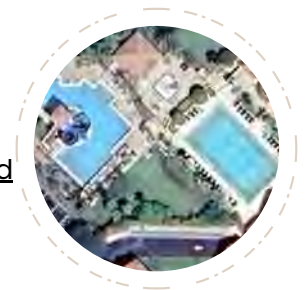
Project Name/Location: **Rivers Edge CDD 1, 2, 3 ("RiverTown") / Saint Johns, FL**  
 Contact: Mac McIntyre Contact Phone: (850) 496-5510  
 Project Type/Description: CDD of 4,400 homes at build-out  
 Dollar Amount of Contract: \$769,000 (+ Cafe w/ \$755K in annual sales)  
 Scope of Services for Project: Amenity Management, Field Operations Management, Facility Maintenance Services, turnkey Café Operation, Lifeguard Staffing, and Lifestyle Programs & Events.  
 Dates Serviced: 2015 – Present



Project Name/Location: **Fleming Island Platnation CDD/Clay County**  
 Contact: Mike Cella Contact: MCella@fipcommunity.com  
 Project Type/Description: CDD of 2,400 homes  
 Dollar Amount of Contract: \$773,743  
 Scope of Services for Project: Amenity Management, Field Operations Management, Facility Maintenance Services, and Lifestyle Programs & Events.  
 Dates Serviced: June 2024 – Present



Project Name/Location: **Marshall Creek CDD ("Palencia") / St. Johns County**  
 Contact: Howard Entman Contact: HentmanMD@gmail.com  
 Project Type/Description: CDD of 2,000 homes  
 Dollar Amount of Contract: \$109,840  
 Scope of Services for Project: Amenity Management – General Manager and Assistant General Manager  
 Dates Serviced: June 2023 – Present



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## REFERENCES

Community References (List all CDDs where Amenity Services are currently provided)						
Community Name	Indicate HOA or CDD	Total # of Households Occupied as of 6/1/2025	County Community is Located	Yrs & Months Contract Managed by Proposer	2024 Total Fee Charged the CDD/HOA for Services	CDD Chair Name & Email
Avenir	Avenir CDD	600	Palm Beach	4 yrs/5 mo.	\$673,000.00	Virginia Cepero - vcepero@avenircdd.org
Tamaya	Beach CDD	1000	Duval	5 yrs/5 mo.	\$407,769.00	Elena Korsakova - boardmember1@beachcdd.com
Johns Creek	Brandy Creek CDD	600	St. Johns	10 yrs/5 mo.	\$203,825.00	Meredith Payne mercey1065@gmail.com
Cross Creek North	Cross Creek North CDD	1112	Clay	2 yr/11 mo	\$378,973.00	Robert Porter - rsporter@drhorton.com
eTown	Cypress Bluff CDD	1400	Duval	5 yrs/5 mo.	\$265,538.00	Joe Muhl - joemuhl@parcgroup.net
Durbin Crossing	Durbin Crossing CDD	2600	St. Johns	18 yrs/5 mo.	\$596,482.00	Peter Pollicino - peterepollicino@gmail.com
Fleming Island Plantation	Fleming Island Plantation CDD	2400	Clay	1 yr/9 mo.	\$773,743.00	Mike Cella - mcella@fipcommunity.com
Glen St. Johns	Glen St. Johns CDD	850	St. Johns	10 yrs/5 mo.	\$40,000.00	Darren Romero - dr51212@gmail.com
Grand Haven	Grand Haven CDD	2000	Flagler	19 yrs/5 mo.	\$839,779.00	Dr. Merrill Stass-Isern - Drmerill@ghcdd.com
Harbour Isles	Harbour Isles CDD	900	Hillsborough	5 yrs/11 mo.	\$121,623.00	Betty Fantauzzi - Seat1@harbourislescdd.org
Heritage Landing	Heritage Landing CDD	1200	St. Johns	20 yrs/5 mo.	\$463,999.00	Kevin Austin - kevinaustinhlcdd@gmail.com
Julington Creek Plantation	Julington Creek Plantation CDD	5800	St. Johns	8 yrs/5 mo.	1.5 Million	Luke Jensen - ljensen@cdd.org
Lakes at Bella Lago	Lakes at Bella Lago CDD	0	Clay	2 yrs/5 mo.	\$46,765.00	DJ Smith - seat1@lakesatbellalagocdd.net
Lakeshore Ranch	Lakeshore Ranch CDD	720	Pasco	10 yrs/5 mo.	\$220,000.00	Ronald Mitchell - Contact via website
Markland	Southaven CDD	356	St. Johns	10 yrs/5 mo.	\$170,679.00	Richard Fetter - Dfetter172cdd@yahoo.com
Montecito	Montecito CDD	450	Brevard	3 yrs/4 mo.	\$163,246.00	Mark Nehiba - Mnehiba@montecitocdd.org
Palenica	Marshall Creek CDD	2,000	St. Johns	3 yrs/1 mo.	\$109,840.00	Howard Entman - HEntmanMD@gmail.com
Parkland Preserve	Parkland Preserve CDD	357	St. Johns	2 yr/9 mo.	\$99,158.00	Alfred Myslicki - Contact via website
RiverTown	Rivers Edge CDD 1, 2 and 3	2950	St. Johns	11 yrs/5 mo.	\$772,325.00	Mac McIntyre - mac.m.mcintyre@gmail.com, D.J. Smith - dj.smith@mattamycorp.com
St. Johns Golf and Country Club Amenity Center	Sampson Creek CDD	799	St. Johns	2 yrs/5 months	\$283,750.00	Graham Leary - learycdd@gmail.com
The Preserve at Wilderness Lake	The Preserve at Wilderness Lake CDD	940	Hillsborough	2 yr/10 mo.	\$145,000.00	Heather Hepner - supervisonwlp5@gmail.com
Venetian	Venetian CDD	1100	Sarasota	5 yrs/5 mo.	1.4 Million	Ken Smaha - Ksmaha@vcdd.org
Wynnfield Lakes	Wynnfield Lakes CDD	372	Duval	5 yrs/5 mo.	\$167,170.00	Dr. Kristi Sweeney - Kristi.sweeney@unf.edu
Yellowbluff Landing	Tison's Landing CDD	680	Duval	7 yrs/5 mo	\$215,381.00	Brandon Kirsch - cddbrandonk@gmail.com



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## SUPPLEMENTAL QUESTIONS

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- Referencing a specific community(s), what Best Practices are now being implemented due to the suggestion of your company? **Please view pages 24 -44 to see the best practices we implement within all of our amenity contracts.**
- Referencing a specific community(s), how have you suggested the Board address the ongoing maintenance and replacement of community assets?
  - **At RiverTown and Durbin Crossing we have recommended that the Board take a proactive, long-term approach to maintaining and replacing community assets by developing and implementing a formal asset management plan. This includes:**
  - **Maintaining an updated asset inventory that lists all community-owned infrastructure, amenities, and equipment, including age, condition, expected useful life, and replacement costs.**
  - **Conduct regular inspections and condition assessments to identify maintenance needs before they become critical issues.**
  - **Establishing a preventative maintenance schedule to extend the useful life of assets and minimize unexpected failures.**
  - **Establishing and following a Reserve Study (along with updating it periodically) to plan and budget for the timely repair and replacement of major assets.**
  - **Ensuring sufficient reserve funding is allocated annually so that funds are available when needed, minimizing the risk of special assessments or emergency expenditures.**
  - **Prioritizing and phasing replacements based on urgency, safety, resident impact, and cost-benefit analysis.**
  - **Communicating transparently with residents about upcoming projects, timelines for completion and how it will benefit/enhance the community.**

## SUPPLEMENTAL QUESTIONS

- How many onsite personnel would you suggest being utilized at Harmony for management and for field maintenance activities not already being performed by outside vendors?
  - **One Manager, three full time hourly, and two part-time hourly associates**
- What types of projects would be handled by such personnel and which projects would be handled by outside vendors?
  - **Amenity Center Maintenance (In-House Focus)**
    - **Daily upkeep of clubhouses, restrooms, and common areas**
    - **Blowing off pool decks, walkways, and parking lots**
    - **Minor repairs: door hardware, lightbulbs, furniture fixes, etc.**
    - **Experience with pressure washing**
  - **Pool Maintenance (In-House Focus)**
    - **Skimming, vacuuming, and emptying skimmer baskets**
    - **Monitoring pool clarity and adjustment of chemical concerns when necessary**
    - **Familiarity with pool equipment (pumps, filters, autofill)**
    - **Balance chemistry in pool including but not limited to PH, Chlorine, Alkalinity, Calcium Hardness and CYA.**
  - **Dog Waste Station Servicing (In-House Focus)**
    - **Emptying receptacles on a regular schedule**
    - **Replacing liners and restocking bags**
    - **Identifying and reporting excessive use or damaged units**
  - **Dock, Pier & Park Inspections and Repairs (In-House Focus)**
    - **Routine inspections of decking, handrails, and tie-offs**
    - **Identification of safety hazards (wood rot, exposed nails, loose boards)**
    - **Minor repairs: tightening hardware, replacing boards, staining/sealing**
    - **Playground inspection familiarity (fall zones, surfacing, structural checks, mulch levels)**
  - **Additional Maintenance Skills (In-House Focus)**
    - **Blower/pressure washer operation for hardscape cleanup**
    - **Use of hand tools and small power tools**
      - **Basic carpentry and mechanical repair**
  - **Ladder safety and ability to work outdoors in all seasons**
  - **Responsibilities NOT Required In-House (Vended Out)**
    - **Pond/lake maintenance**
    - **Chemical balancing and pool water treatment (if vendor-managed) (though staff should still monitor/report visible water quality issues)**

## SUPPLEMENTAL QUESTIONS

- What skill sets and prior experiences would you seek in personnel to achieve the staffing support described in the prior question?
  - **Personnel should have the ability to support daily maintenance operations, with a blend of technical competencies, relevant hands-on experience, and problem-solving abilities.**
    - **General Facility Maintenance**
    - **Basic plumbing (leak repair, unclogging, fixture replacement)**
    - **Basic electrical (light fixture replacements, breaker resets, outlet troubleshooting)**
    - **Carpentry (door/hardware repairs, fence fixes, minor structural repairs)**
    - **Painting and drywall patching**
    - **HVAC Knowledge**
    - **Basic understanding of HVAC systems**
    - **Ability to troubleshoot temperature inconsistencies or unit errors**
    - **Experience with preventative maintenance schedules**
    - **Understanding of Irrigation & Landscaping Systems along with Strong Vendor Management**
    - **Timer/controller troubleshooting**
    - **Knowledge of Landscape**
    - **Pool & Water Feature Maintenance**
    - **Understanding of pool chemistry (pH, chlorine balance)**
    - **Knowledge of pump/filter operations and maintenance**
    - **Experience with daily pool checks and chemical logs**
    - **Preventative Maintenance Routines**
- For each such individual, what would be the weekly number of hours devoted to the Harmony CDD?
  - **100% of their time—45–50 (or as business requires) hours per week for the Field Manager, 40 hours per week for the full time Maintenance Techs, and 20–24 hours per week for the part time maintenance techs.**
- Please provide appropriate contact information for every community referenced in your answers.
  - **Please see table on page 60.**





# PRICING



## PRICING

**8.G.****PRICING – FIELD MANAGEMENT AND MAINTENANCE SERVICES**

- Task 1.A. – Management with Proposer Employees
    - A. General Manager
      - o Year 1 - \$115,497.60 \_\_\_\_\_
      - o Year 2 - \$118,742.21 \_\_\_\_\_
      - o Year 3 - \$122,641.15 \_\_\_\_\_
      - o Number of full-time managers or assistant managers \_\_\_\_\_  
One (1)
      - o Number of part-time managers or assistant managers \_\_\_\_\_  
Zero
  - Task 1.B. – Management with District Employees (proposal alternate)
    - A. General Manager
      - o Year 1 - \$128,009.84 \_\_\_\_\_
      - o Year 2 - \$131,605.95 \_\_\_\_\_
      - o Year 3 - \$135,927.27 \_\_\_\_\_
      - o Number of full-time managers or assistant managers \_\_\_\_\_  
One (1)
      - o Number of part-time managers or assistant managers \_\_\_\_\_  
Zero
  - Task 1.C. – Management with Third-Party Employees (proposal alternate)
    - A. General Manager
      - o Year 1 - \$128,009.84 \_\_\_\_\_
      - o Year 2 - \$131,605.95 \_\_\_\_\_
      - o Year 3 - \$135,927.27 \_\_\_\_\_
      - o Number of full-time managers or assistant managers \_\_\_\_\_  
One (1)
      - o Number of part-time managers or assistant managers \_\_\_\_\_  
Zero
- If there would be an additional management charge if the District were to open and operate a RV storage lot, how much extra would it cost for management in Year 1, if any?
- o \$ \_\_\_\_\_ No additional cost



- Task 2.A. – Maintenance Staffing
  - o Year 1 - \$ 292,420.28
  - o Year 2 - \$ 304,059.05
  - o Year 3 - \$ 315,860.98
  - o Number of full-time employees performing maintenance                       
Three (3)
  - o Number of part-time employees performing maintenance                       
Two (2)
  - If a subcontractor is proposed, please indicate:  
N/A
  - Amount to be Paid to Subcontractor for Year 1:  
  
\$
  - Mark up retained by Proposer for Year 1:  
  
\$
- Task 2.B. – Maintenance Staffing with addition of leaf pick up services along community roadways when needed (proposal alternate)
  - o Year 1 - \$ 312,420.00
  - o Year 2 - \$ 324,059.00
  - o Year 3 - \$ 335,860.00
  - o Number of full-time employees performing maintenance                       
Three (3)
  - o Number of part-time employees performing maintenance                       
Three (3)
  - If a subcontractor is proposed, please indicate:  
N/A
  - Amount to be Paid to Subcontractor for Year 1:  
  
\$
  - Mark up retained by Proposer for Year 1:  
  
\$



## PRICING

- Task 2.C. – Maintenance Staffing with addition of RV lot maintenance (proposal alternate)

- Year 1 - \$ Same as task 2A
- Year 2 - \$ Same as task 2A
- Year 3 - \$ Same as task 2A
- Number of full-time employees performing maintenance \_\_\_\_\_
- Number of part-time <sup>Three (3)</sup> employees performing maintenance \_\_\_\_\_
- <sup>Two (2)</sup>

If a subcontractor is proposed, please indicate:

- Amount to be Paid to Subcontractor for Year 1:

§

- Mark up retained by Proposer for Year 1:

§

Currently, the District's field service company performs overall maintenance of all District ponds and conservation areas under the existing agreement. That includes: maintaining the required Florida Aquatics Pesticide/Herbicide Certification; providing a monthly pond report and Conservation Area report to the District Manager; keeping record of and updating all Safety Data Sheets (SDS) and Conservation Area treatment logs; ordering required chemicals; maintaining all equipment required for spraying ponds and Conservation Areas; safely storing all chemicals used on ponds and Conservation Areas; applying chemicals to ponds and Conservation Areas in accordance with applicable laws and District policy, as needed. If Proposer were to provide a maintenance employee to provide this service, how much extra would it cost for maintenance in Year 1, if any?

The proposer would seek to have a vendor contract with the District for his services.

- § \_\_\_\_\_

---

**SIGNED  
ACKNOWLEDGEMENT**

---

**8.H.  
ACKNOWLEDGEMENT**

Under penalties of perjury under the laws of the State of Florida, I declare that I have read the foregoing Proposal Forms and all of the questions are fully and completely answered, and all of the information provided is true and correct.

Dated this 9<sup>th</sup> day of July, 2025.

Proposer: **Vesta Property Services, Inc.**

By: *Patti Brown*

Title: **Director of Business Development**

STATE OF Florida  
COUNTY OF Duval

The foregoing instrument was acknowledged before me this 9<sup>th</sup> day of July, 2025, by Patti Brown of Vesta Property Services, Inc. who is personally known to me or who has produced \_\_\_\_\_ as identification, and did ☒ or did not [ ] take the oath.



**KIMBERLY A. GOODWIN**  
Notary Public  
State of Florida  
Comm# HH673898  
Expires 6/8/2029

*Kimberly A. Goodwin*  
Notary Public, State of Florida  
Print Name: Kimberly A. Goodwin  
Commission No.: HH673898  
My Commission Expires: 6-8-2029

“ A key reason we contract with Vesta is our strong work-relationship with their Management Team. Vesta has been operating our amenities since they opened in 2006, and when deciding on the level of customer service and cost to the District, our relationship is such that we take into consideration what's best for each other.

*Either trust who you work with to do what's best for all, or else don't hire (or retain) them. It has to be a partnership to work, and **I trust Vesta's Management Team.***

Michael C. Taylor, Board Chairman; Heritage Landing CDD

”





# Certificates of Insurance

**ACORD** **CERTIFICATE OF LIABILITY INSURANCE** DATE: 08/01/2024

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

If this certificate is being prepared for a party who has an insurable interest in the property, do not use this form. Use ACORD 27 or ACORD 28.

<b>PRODUCER</b> Associations Insurance Agency, Inc. 5401 North Central Expressway, Suite 315 Dallas, TX 75205	<b>CONTACT NAME:</b> Associations Insurance Agency, Inc. <b>PHONE:</b> (866) 384-8579 <b>FAX:</b> (214) 751-2390 <b>E-MAIL ADDRESS:</b> CertificateRequest@AssociationsInsuranceAgency.com <b>PRODUCER CUSTOMER ID:</b> 00003921
--	---

<b>INSURED</b> Vesta Property Services, Inc. 245 Riverside Ave., Ste 300 Jacksonville, FL 32202	<b>INSURER(S) PROVIDING COVERAGE</b> INSURER(A): Integrity Specialty Insurance Company INSURER(B): Axis Surplus Lines INSURER(C): Vantage Risk Specialty Insurance Company INSURER(D): Fair American Select Insurance Company
--	---


**COVERAGES** REVISION NUMBER:

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

LINE	TYPE OF INSURANCE	POLICY NUMBER	POLICY PERIOD (MM/DD/YYYY)	POLICY EXPIRATION DATE (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> SEVERABILITY OF DAMAGES GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:	X X 01-B-GL-P00006555-5	08/01/2024	08/01/2025	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED EQUIPMENT \$ 500,000 MED EXP (Any one person) Excluded PERSONAL & ADJ INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS-COMP/OP AGG \$ 2,000,000
B	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> Hired AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS <input type="checkbox"/> OTHER:				COMBINED SINGLE LIMIT (Per occurrence) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per person) PROPERTY DAMAGE (Per accident)
B-1	<input checked="" type="checkbox"/> UMBRELLA LIMIT <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIMIT <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> RETENTION \$	Various (see attached)	08/01/2024	08/01/2025	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000 PER SEVERAL ACCIDENTS \$ PER SEVERAL EMPLOYEES \$ PER SEVERAL POLICY LIMITS \$

SPECIAL CERTIFICATES OTHER COVERAGES (Number ACORD 101, Additional Permitted Schedule, if more space is required)

Certificate Holder is an Additional Insured, with respects to the GL Policy, per written contract.

<b>CERTIFICATE HOLDER</b> **Insurance Verification**	<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE  Title: Broker
---	---

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“

I have had the pleasure of collaborating with Vesta throughout my 14-year tenure on the Bartram Springs CDD Board with the last six as Chair, and I cannot tell you how refreshing it was to work with an organization that supported the board's mission so well. The true test of a great company and staff is not how they manage the easy tasks but how they handle the hard tasks, problems or issues. Vesta does an incredible job. I give my highest recommendation to Vesta Property Services.

E. Kevin Colcord, past Board Chairman, current Bartram Springs CDD Resident

”

## Certificates of Insurance

Client#: 97496		ASSOCIA	
<b>ACORD</b>		<b>CERTIFICATE OF LIABILITY INSURANCE</b>	
		DATE (MM/DD/YYYY) 8/27/2024	
<p><b>THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.</b></p> <p><b>IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer any rights to the certificate holder in lieu of such endorsement(s).</b></p>			
<b>PRODUCER</b> <b>USI Southwest</b> <b>5811 Katy Freeway, Suite 500</b> <b>Houston, TX 77024</b> <b>713-490-4600</b>		<b>INSURED</b> <b>Vesta Property Services, Inc.</b> <b>245 Riverside Avenue, Suite 300</b> <b>Jacksonville, FL 32202</b>	
<b>INSURER</b> <b>Carla Turner</b> <b>PHONE (A/C, No, Ext): 713-490-4600</b> <b>EMAIL ADDRESS: carla.turner@usi.com</b>		<b>INSURANCE AFFORDING COVERAGE</b> <b>INSURER A: Sentry Insurance Company</b> <b>INSURER B:</b> <b>INSURER C:</b> <b>INSURER D:</b> <b>INSURER E:</b>	
		NAIC # 14988	
<b>COVERAGES</b>		<b>CERTIFICATE NUMBER:</b>	
<b>REVISION NUMBER:</b>			
<p><b>THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.</b></p>			
POLICY	TYPE OF INSURANCE	POLICY NUMBER	LIMITS
	<input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR <input type="checkbox"/> GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:		EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Per occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADJ INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMMOD AGG \$ \$
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> HIREO AUTOS ONLY <input checked="" type="checkbox"/> Drive Dr Car <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> UNOWNED AUTOS ONLY <input type="checkbox"/> UMBRELLA LMR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$ WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER MEMBER EXCLUSION? <input type="checkbox"/> Y/N (Mandatory in NH) (If yes, describe under DESCRIPTION OF OPERATIONS below)	9017983003	08/01/2024 08/01/2025 SCHEDULED SINGLE LIMIT (Per accident) \$5,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$ EACH OCCURRENCE \$ AGGREGATE \$ PER STATE <input type="checkbox"/> PER PA <input type="checkbox"/> EL EACH ACCIDENT \$ EL DISEASE - SA EMPLOYEE \$ EL DISEASE - POLICY LIMIT \$
A	Hired Autos Physical Damage	9017983003	08/01/2024 08/01/2025 \$1,000 Comp. Deductible \$1,000 Coll. Deductible \$50,000 Max Limit
<p><b>DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101. Additional Remarks Schedule, may be attached if more space is required)</b>  <b>The Automobile policy includes an automatic Blanket Additional Insured endorsement that provides additional insured status to the certificate holder only when there is a written contract between the named insured and certificate holder that requires such status. The Automobile Liability policy also includes an endorsement with Primary and Non-Contributory wording, as required by written contract.</b>  <b>(See Attached Descriptions)</b></p>			
<b>CERTIFICATE HOLDER</b>		<b>CANCELLATION</b>	
For informational Purposes Only		<p><b>SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.</b></p> <p><b>AUTHORIZED REPRESENTATIVE</b>  </p>	
<p>ACORD 25 (2018/03) 1 of 2 The ACORD name and logo are registered marks of ACORD © 1988-2015 ACORD CORPORATION. All rights reserved.</p> <p>#EAK00192/MAK000124 SKP7R</p>			

“ I live in ETown and Vesta does our Recharge Center. I want to give 5 stars to Vesta for doing a good job taking care of our Amenity Center and for Marcy who is our manager there. She does a wonderful job having so many fun activities for our community, and keeps everything nice and clean there too!

Angie A - Northeast Florida CDD Resident

”

ACORD		CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY): 1/3/2025	
<p>THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.</p> <p>IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).</p>					
<b>PRODUCER</b> Arthur J. Gallagher Risk Management Services, LLC 501 Riverside Ave Suite 1000 Jacksonville FL 32202		<b>CONTACT</b> NAME: Jessica Goff PHONE: (904) 548-2301 FAX: (904) 548-1302 ADDRESS: Jessica_Goff@ajg.com		<b>INSURER A: AFFORDING COVERAGE</b> INSURER A: Accident Fund Insurance Company of America NAIC # 10165	
<b>INSURED</b> Vesta Property Services, Inc. 245 Riverside Avenue Suite 300 Jacksonville FL 32202		<b>INSURER B:</b> <b>INSURER C:</b> <b>INSURER D:</b> <b>INSURER E:</b> <b>INSURER F:</b>			
<b>COVERAGES</b>		<b>CERTIFICATE NUMBER:</b> 1173730810		<b>REVISION NUMBER:</b>	
<p>THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.</p>					
<b>TYPE OF INSURANCE</b> <input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAMS-MADE <input type="checkbox"/> OCCUR <input type="checkbox"/> GEN. AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:	<b>ACORD 101</b> <b>PROD. WYO.</b>	<b>POLICY NUMBER</b>	<b>POLICY EFF.</b> (MM/DD/YYYY)	<b>POLICY EXP.</b> (MM/DD/YYYY)	<b>LIMITS</b> EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Per occurrence) MED EXP. (Per occurrence) PERSONAL & ADJ. INJURY GENERAL AGGREGATE PRODUCTS - COMMODITY AGG. OTHER:
<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO: <input type="checkbox"/> OWNED <input type="checkbox"/> AUTOS ONLY <input type="checkbox"/> RENTED <input type="checkbox"/> AUTOS ONLY <input type="checkbox"/> SCHEDULED <input type="checkbox"/> AUTOS <input type="checkbox"/> NON-OWNED <input type="checkbox"/> AUTOS ONLY					BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per occurrence)
<b>UMBRELLA LIABILITY</b> <input type="checkbox"/> EXCESS LIABILITY <input type="checkbox"/> CLAMS-MADE <input type="checkbox"/> OCCUR <input type="checkbox"/> RETENTION \$					EACH OCCURRENCE AGGREGATE
<b>WORKERS COMPENSATION AND EMPLOYERS LIABILITY</b> ANNUAL PREMIUM/PAID/RETENTION (OFFICE/WORK/ON-ROAD) (Mandatory in FL) If yes, list under DESCRIPTION OF OPERATIONS below	Y/N N/A	100074418	1/1/2025	1/1/2026	<input checked="" type="checkbox"/> PER STATE <input type="checkbox"/> OTHER EL PER ACCIDENT \$1,000,000 EL DISEASE - EA EMPLOYEE \$1,000,000 EL DISEASE - POLICY LIMIT \$1,000,000
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule may be attached if more space is required)					
<b>CERTIFICATE HOLDER</b> Proof Of Coverage		<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE Jessica Goff			
ACORD 25 (2019/03)		The ACORD name and logo are registered marks of ACORD. All rights reserved.			

“

Vesta has provided us with a great crew and staff. I am in full support of Vesta. John is always available he is reliable and helpful. The chefs always have a great variety on the menu and are open to suggestions. The staff is polite helpful and really cares about the residents of Grand Haven. Please do not hesitate to call on me if needed.

Barbara Correa - Grand Haven CDD

”



COPY



CELEBRATING 30 YEARS OF SERVICE  
TO OUR COMMUNITIES  
1995 - 2025

## Contact Us

Vesta Property Services  
250 International Pkwy #208  
Lake Mary, FL 32746  
(321) 263-0132



COPY



BERMAN



HARMONY

## HARMONY CDD

BERMAN PROPOSAL

Amenity Manager and Field  
Maintenance Services

July 2025

Trust your property with  
Berman.





July 2025

## Harmony CDD

Kubra Metin  
107 West College Ave  
Tallahassee, FL 32301

**Dear Mr. Metin,**

On behalf of the entire Berman team, I am pleased to submit this proposal to provide complete field management and maintenance services for the Harmony CDD and adjacent amenities.

As I discussed in the field management and maintenance proposal, my company started 20 years ago with the goal of providing outstanding janitorial services to clients throughout Florida. We knew there was a significant need for a company that focuses on details and excels in customer service and quality control.

I believe Berman is your best option for all of your maintenance needs too because our team has the wide range of expertise needed to ensure the amenity areas remain a beacon for all guests to the facility.

For instance, did you know that Berman is a licensed general contractor? While we don't anticipate managing major construction projects, our team can handle any repair, any improvement to the facility or any job that might come up without delays in finding someone.

Throughout this proposal, we hope it becomes clear that Berman is the right partner to uphold the appearance, functionality, and overall quality of Harmony CDD to the highest standards.

I look forward to working with you and your team for many years to come.

Sincerely,

A handwritten signature in black ink that reads "Marty Berman".

**Marty Berman**

Founder & President



## Table of Contents

01 [Why Berman](#)

02 [Our Capabilities](#)

03 [Our Team](#)

04 [Relevant Experience](#)

05 [Pricing](#)





# Why Berman

**Trust your property with  
Berman.**





## Berman is Your Trusted Maintenance Partner

### Who We Are

**Berman offers** full-service maintenance services, focused on ensuring communities across Central Florida are beautiful.

**Berman oversees** all aspects of maintenance services, from routine cleaning to pressure washing to minor repairs.

**Berman becomes** a key partner in the success of a community, ensuring home prices and rental rates remain at the top of the market.

### What We Do

**Berman manages** all aspects of the community's maintenance needs, providing comprehensive services backed by a team with decades of experience working in some of Central Florida's most desirable communities, like Lake Nona and Bay Hill.

**Berman works for you**, understanding our services help your investment in communities remain profitable, regardless of your short- or long-term goals.

### Our Services

- ✓ Janitorial Services
- ✓ 24/7 Emergency Repairs
- ✓ General Construction
- ✓ Property Maintenance
- ✓ Preservation & Foreclosure Services
- ✓ Pressure Washing
- ✓ Landscaping
- ✓ Disaster Response



## Why Choose Berman?

We offer services nationwide, providing dependable, professional, and cost-effective facility services.

You need Berman because Berman:

- **Understands** the value of your investment and will treat it like our own.
- **Utilizes** the latest technology to ensure efficiencies and savings throughout the community.
- **Specializes** in providing customer service and training programs from The Ritz Carlton to provide high-end experiences.
- **Embraces** sustainability, intricate reporting measures, and more.
- **Delivers** proven quality control programs to provide the highest level of results for clients.
- **Realizes** key cost savings through a wide range of programs and procedures proven through decades of experience.

## BERMAN GROUP BY THE NUMBERS



**20M SQ FT**  
Commercial Space



**2006**  
Founded by Marty Berman



**24/7**  
Unparalleled Customer Service



**250**  
Total Staff in the Market

## The Berman Promise

Berman has been accommodating property owners since 2006. Our promise to our clients is that we will treat every property, every tenant, every investment as if it were our own to deliver exemplary results for every property we manage.

## Caring for Our Partners

Berman understands the importance of always maintaining the highest levels of customer service. We have always been at the forefront of customer service within the property and facility industry.



### Gold-Standard Customer Service

**Berman has adopted** the customer service initiatives being used by the world's largest hospitality companies, The Ritz Carlton and Disney Institute, for our front-line staff processes.

**Berman now has** multiple managers who have completed customer service training courses. This extensive training is now mandated for all senior managers and is provided annually to ensure the most current techniques are taught to our employees who provide service at your facility.

**These trainings** clearly teach that employees are expected to be polite, helpful, friendly, and deferential to tenants or guests needs. Employees are to stop work and clear a right of way whenever a tenant or guest approaches. Supplies and tools are always stored out of sight.

### Industry Leadership

**We also frequently** provide customer service training to other vendors, such as the "Houston Friendly" program for Houston Airport Systems as well we have also managed the "Passport to Service Excellence" program at Hartsfield-Jackson International Airport.





## Quality Management

### Eliminating even the tiniest issues

In addition to the routine monitoring and surveillance of our performance, our Corporate Support Team will coordinate with onsite staff and management assigned to the property to provide quality assurance oversight and help ensure optimal results.

This quality control plan covers all service functions that involve the receipt of work, planning, estimating, scheduling, material acquisition, work assignment, work supervision/inspection, corrective action, and preventive action.

### Commitment to Excellence

Berman is committed to providing our clients with excellent facility services in addition to providing the highest levels of customer service. Therefore, in addition to the training initiatives, our employees are put through a rigorous customer service training program to ensure that our employees are consistently meeting the goals of “The Berman Experience.”

Locally owned, Berman is available for you to reach when issues arise. Our headquarters are just down the road from Harmony CDD, giving you peace of mind that Berman can activate more staff and management to ensure we provide the absolute best quality of service for you and your team.

We work with high-profile brands that are built around quality and cleanliness. It is our brand to keep the properties they own at the highest standards possible. We’ll do the same for you.



## **Berman's Approach to Field Management & Maintenance Services**

### *For Harmony Community Development District*

At Berman, we deliver field management and maintenance services with a proactive, hands-on approach focused on preserving and enhancing the long-term value, aesthetics, and performance of the Harmony CDD's assets.

### **Dedicated Oversight**

Our experienced Field Manager serves as the CDD's on-the-ground representative—conducting regular inspections, identifying issues early, and ensuring all services meet contractual standards and community expectations. From landscaping and irrigation to signage, hardscapes, and amenity areas, we maintain a consistent pulse on the property's condition and performance.

### **Vendor Coordination & Compliance**

We act as the central point of contact between the Board, residents, and third-party service providers. Berman coordinates vendor activity, enforces accountability, and ensures all work aligns with established scopes. We also assist with permitting, compliance, and regulatory coordination as needed.

### **Transparent Communication**

Using cloud-based tools, we document inspections, track open items, and provide real-time updates. Our team submits regular field reports, attends Board meetings, and offers professional recommendations to support strategic planning and budgeting.

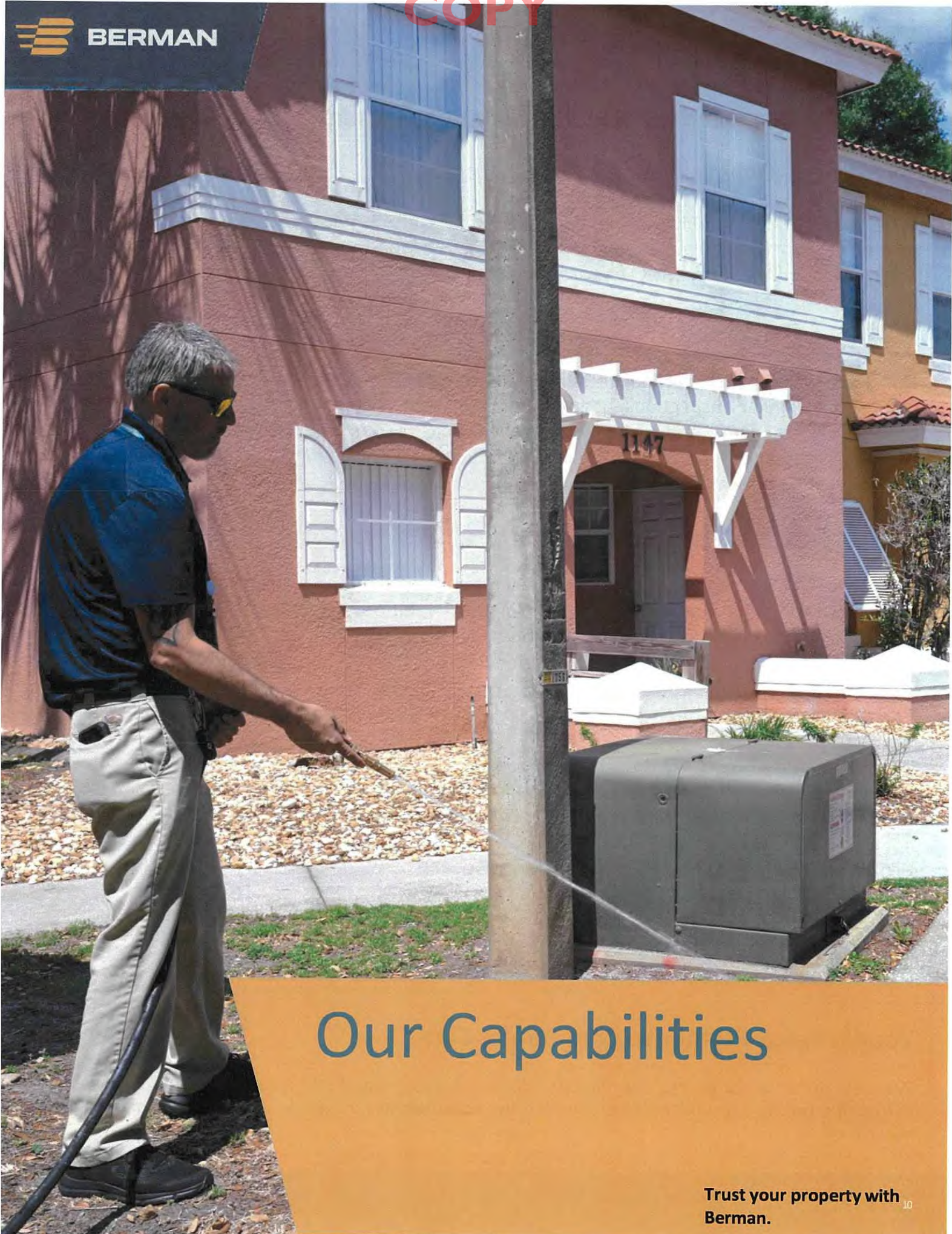
### **Proactive Maintenance & Rapid Response**

Our approach emphasizes preventative care to avoid costly repairs and downtime. When urgent needs arise, Berman responds quickly with an experienced team and the right resources to resolve issues efficiently and safely.

## **Your Trusted Partner in Community Care**

We view our role not just as a service provider, but as a trusted extension of the CDD's leadership team—committed to protecting the community's integrity, appeal, and long-term success.





# Our Capabilities

Trust your property with  
Berman. <sup>10</sup>



## Janitorial Services

### Make a Sparkling Impression with Berman

**It's not just about cleaning.** It's about making a great first impression. A tidy workspace enhances your business and improves the productivity of your employees.

### Be Clean and Green with Berman's Eco-Friendly Standards

**We use our Excellence in Service** program (ES program) to carefully maintain and manage all janitorial procedures. Our dedication to cleanliness, coupled with our trained professionals, provides an unparalleled level of cleanliness safety, and customer service.

**One of Berman's largest divisions** is our Janitorial Services line of business. We help a variety of commercial spaces, including offices, retail stores, schools, warehouses, laboratories, multi-family properties, and more put their best foot forward when it comes to cleanliness.

**At Berman, we use approved** Green Seal chemicals to reduce our environmental impact. We are fully trained in Leadership in Energy and Environmental Design to help you maintain your LEED certification.

### FULL-SERVICE CLEANING



Nightly & Daily  
Cleaning



Carpet Cleaning



Day Porter  
Services



Disinfection Services



Window  
Cleaning



Floor Waxing,  
Stripping & Polishing



## Landscaping

### The Grass is Greener with Berman

**Berman is a full-service** property and facility service company that provides hassle-free landscaping services.

**We do more than cut the grass.** We maintain entire real estate portfolios of landscaping with our skilled team of maintenance staff, including horticulturists, irrigation specialists, and detailed gardeners that have managed the landscaping at some of the world's most famous commercial gardens and theme parks. Our professionals treat your property as if it were our own to give you peace of mind.

**We understand that** your property needs and expectations are unique. To meet your vision, we offer personalized landscaping services. Our professionals strive to maintain the aesthetic of local communities and commercial properties of all shapes and sizes.

**Our landscaping services** ensure that your property is well-maintained year-round. Berman offers scheduled maintenance plans that meet your schedule. All services are provided in a timely manner with high-quality equipment to ensure your property maintains a polished appearance at all times.

### FULL-SERVICE LANDSCAPING



Lawn  
Care



General Garden  
Maintenance



Fertilization, Weed, &  
Pest Management



Landscape  
Renovation



Tree Care &  
Removal



Mulching



Storm Preparedness  
& Response



Landscape and  
Irrigation  
Installation

## On-Demand Repairs

### 24-Hour Repair Services

**On-Call Property Maintenance and Repair.** Something not quite right with your facility or rental property? Give Berman a call. We're on call 24/7 to take on a variety of emergency maintenance requests, so you don't have to be.

#### Our 24-Hour Property and Facility Repair Services.

Many companies offer repair services, but few are available on-demand night and day. Once you contact Berman, we'll be there within the hour to help troubleshoot problems on site. All of our repair specialists are cross-trained in multiple fields, so you can rest easy knowing we're on the job.

**Additional Specialty Services.** As a full-service provider, we can help you maintain your property. Sometimes the best way to avoid an emergency is preventive maintenance. Whether you need assistance right away, or want to make sure your property or facility is in peak condition, our professionals can help.

#### FULL-SERVICE REPAIRS



HVAC Repair



Electrical Repair



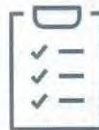
Plumbing Services



Storm Damage & Disaster Repair



Fire Damage Restoration



Handyman Repairs



General Repairs



Break-In & Burglary Repair



## Business Continuity & Emergency Preparedness

The main threat to continuity is primarily focused on labor resources and resources during times of emergencies and disaster. To combat these threats, Berman's number one priority is securing our full-time labor, part-time labor, and additional emergency labor via labor providers as well as existing employee resources.



### Emergency Staffing Plan

For more than a decade years, Berman has tested our emergency response plan during several emergencies. Our labor resources are our prime competitive advantage. Additionally, our redundant communication systems allow seamless communication even during outages.



### Hurricane Preparedness

Another strength of our business continuity plan is stockpiling hurricane resource supplies in both our Orlando warehouse and a secondary out-of-state warehouse that wouldn't be impacted by the same disaster. This allows us to have satellite supplies in the event of an interruption.



### Extensive Emergency Response

Lastly, we have extensive emergency response plans for every facility we work on. Planning and training are the key to effectively managing during a business interruption. In extreme circumstances, there may be situations where deficient staffing levels are unavoidable due to Mother Nature.

## Security

### Full-Scale Security Services, Tailored to Fit Your Needs

**On-Site Security.** Our highly-experienced security officers are prepared to maintain a safe environment that brings peace of mind to you and your patrons.

**Mobile Route Patrols.** No matter your asset, you can rely on our mobile patrol units. Our mobile units are equipped to support your security needs by handling disturbance calls, monitoring public areas, and more!

**24/7 Camera Remote Monitoring.** Designed to keep your property and high-value assets safe at all times, our 24/7 Camera Remote Monitoring works in conjunction with our state-of-the-art Command Center to ensure your property is always under a watchful eye!

**Going Above and Beyond with State-of-the-Art Tech.** We go far beyond the competition to provide the peace of mind you need. With the in-depth services and high-tech capabilities of Berman, you can sleep peacefully knowing that your assets are always protected.

### FULL-SERVICE SECURITY



Commercial Office Buildings



Commercial Properties



Retail & Entertainment Facilities



Homeowner Associations



Apartment Communities



Hotels & Resorts



## Licenses

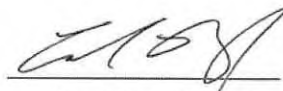
### *State of Florida Department of State*

I certify from the records of this office that BERMAN CONSTRUCTION LLC is a limited liability company organized under the laws of the State of Florida, filed on March 15, 2010, effective March 15, 2010.

The document number of this limited liability company is L10000028603.

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

*Given under my hand and the  
Great Seal of the State of Florida  
at Tallahassee, the Capital, this  
the Twenty-eighth day of January,  
2025*

  
*Secretary of State*

Tracking Number: 2852122458CC

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>

## Licenses

 Ron DeSantis, Governor

Melanie S. Griffin, Secretary



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

**DIVISION OF REAL ESTATE**

THE CORPORATION HEREIN HAS REGISTERED UNDER THE  
PROVISIONS OF CHAPTER 475, FLORIDA STATUTES

**BERMAN CONSTRUCTION LLC**

BERMAN  
6820 MARWICK LANE  
SUITE #150  
ORLANDO FL 32827

**LICENSE NUMBER: CQ1067480**

**EXPIRATION DATE: MARCH 31, 2026**

Always verify licenses online at [MyFloridaLicense.com](https://MyFloridaLicense.com)

ISSUED: 01/13/2024

Do not alter this document in any form.

This is your license. It is unlawful for anyone other than the licensee to use this document.





## Licenses



## Certified Pest Control Operator license



State of Florida  
Department of Agriculture and Consumer Services  
Bureau of Licensing and Enforcement

**CERTIFIED PEST CONTROL OPERATOR**

Number: JF354187

DOYLE BATTEN

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

*Lawn and Ornamental*

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



  
WILTON SIMPSON  
Commissioner of Agriculture

*In Testimony Whereof, Witness this*  
*signature in Tallahassee, Florida on June 28, 2024*  
  
Chief, Bureau of Licensing and Enforcement

DACS form 1780, Feb. 99





# Our Team

Trust your property with  
Berman.



## Martin C. Berman

Founder & President

18 Years With Berman

20+ Years In the Industry



### Introduction

As the President and Founder of Berman, Marty is the Chief Executive and oversees all of the company's strategy as well as the sales and marketing teams. He is responsible for the continued growth of Berman and also ensuring the company gives back to the communities where we operate.

### Education and Certificates

- ✓ **Education** Drexel University, Construction Management
- ✓ **Certified** Safety Planner and Certified Safety Trainer
- ✓ **Licensed** General Contractor

### Recognitions

- ✓ **Marty has been recognized** by industry leaders and currently speaks about facility management, customer service, and facility safety across the country.

### Project Experience

- ✓ **Tavistock Development**, Mixed-use commercial and residential, Orlando, FL, One million square feet of space.
- ✓ **The Esplanade**, commercial mixed-use facility, West Palm Beach, FL, 100,000 square feet of space
- ✓ **Tupperware Corporate Campus**, commercial office, Orlando, FL, 50,000 square feet of space





A native of New Jersey, Samantha relocated to Florida in 2007 to join Berman and has since risen through the ranks to her current role as Senior Vice President. With a strong background in technical maintenance program management and janitorial operations, She plays a critical role in overseeing Berman's CDD maintenance operations, ensuring communities receive proactive, responsive, and high-quality service. In addition to leading Administration and Human Resources, Samantha serves as the senior executive for our Orlando market—guiding the strategic direction of our local operations and directly supporting our District Management Team to meet the evolving needs of CDD clients.

- ✓ Montecito CDD, Amenity Management and Field Maintenance
- ✓ Parker Road CDD, Amenity Management and Field Maintenance
- ✓ UF Research and Academic Center at Lake Nona Janitorial Services
- ✓ Tupperware Corporate Campus Facility Maintenance Services
- ✓ Tavistock Development Property Management services
- ✓ Bay Hill Country Club Security Services
- ✓ Bay Hill Community Association Property Management Services.



Eddie Padua brings over 15 years of diverse experience in event operations, building and facilities management, and project oversight, with a global perspective shaped by roles in Dubai, Australia, and the UK. His background includes leadership positions with Simon Property Group, coordination efforts for two Olympic Games, and recent facility work with the USTA. Eddie is highly skilled in managing community assets, vendor coordination, and delivering results in dynamic, fast-paced environments. His proven ability to oversee large-scale operations and respond effectively to the daily needs of residential communities makes him a strong asset to CDD field services and long-term maintenance planning.

- ✓ United States Tennis Association (National Campus)
- ✓ Tavistock Development, Operations
- ✓ Bellalago Security Services
- ✓ O'Connor Properties, over 900,000 square feet of combined space
- ✓ ADNH Compass
- ✓ Simon Property Group
- ✓ Montecito CDD, Amenity Management and Field maintenance
- ✓ Parker Road CDD, Amenity Management and Field Maintenance



# Proposed Staffing Levels & Structure – Harmony CDD

Berman has assigned a dedicated team to manage amenity operations, field services, and maintenance for Harmony CDD. Our self-performing model ensures responsive, proactive, and high-quality service.

## On-Site Team Assigned to Harmony CDD:

**General Manager:** Leads all operations and serves as the main point of contact with the District Manager and Board.

**Amenities Manager:** Manages amenity operations and events, ensuring a safe and welcoming resident experience.

**Field Service Manager:** Oversees field tasks, vendor performance, and routine inspections.

**Maintenance Technician:** Handles daily maintenance, repairs, and inspections across the community.

**Facilities Attendant:** Supports amenity cleanliness, assists residents, and maintains a safe environment.

**Lifeguards (Seasonal):** Ensure pool safety and enforce rules during operational hours.

## Executive Support & Oversight:

**Executive Leadership:** Provides strategic oversight and ensures alignment with Harmony CDD goals.

**Remote Admin Support:** Manages scheduling, reporting, and documentation needs.

**Specialty Vendors:** Coordinated by Berman to ensure licensed, quality services as needed.

This streamlined team is fully equipped to support Harmony CDD's evolving needs with care and professionalism.





Relevant  
Experience

Trust your property with  
Berman.





## Project Experience: Parker Road CDD

### Overview

Berman began working with Parker Road CDD, providing full-service amenity management and field maintenance. Our team is responsible for the daily upkeep of all common areas, including parks, trails, and stormwater ponds, as well as pool monitoring, janitorial, and resident support services.

Our amenity manager oversees operations onsite, coordinates community events, enforces facility rules, and acts as a direct liaison between residents and the District. In addition, our maintenance technician performs routine inspections and repairs, ensures landscape contractor accountability, and addresses resident concerns swiftly.

Berman's ability to self-perform services has provided the District with responsive, high-quality service and consistent cost control.

### Project Details

Project Name:	<b>Parker Road CDD</b>
Client Contact:	<b>Vivian Carvalho</b>
Client Email/Phone:	<b>407-723-5900</b>
Service Period:	<b>2025 – Current</b>
Project Manager:	<b>Eddie Padua</b>

### Services Provided

- ✓ **Amenities Management**
- ✓ **Full-service Janitorial**
- ✓ **On-demand Repairs**





## Project Experience: Laureate Park

### Overview

Throughout the state, Lake Nona is known for its top-notch communities, often listed among the most desirable in Florida.

As part of its overall agreement with Tavistock, Berman is responsible for the upkeep of the Laureate Park community and, particularly, its aquatic center.

Berman acts as an owner's representative for all of Lake Nona's property management and operations and ensures the community's high standards for innovation, technology, and aesthetics are met to deliver an unrivaled experience for all who live in, work in, or visit Lake Nona.

This center is quite unique. The resort-style Aquatic Center, located in Laureate Park Village Center, features a splash pool complete with zero-entry admission, deck jets, water cannons, and a 25-foot-tall dumping bucket for hours of fun in the sun.

Nearby, a tranquil pool with private cabanas and five junior Olympic lap lanes is perfect for relaxation.

Berman maintains all janitorial services for this center, along with landscaping and security, making sure the community's residents and their guests experience a true reflection of the brand of quality and cleanliness experienced throughout Lake Nona.

### Project Details

Project Name:	Laureate Park
Client Contact:	Denise Burgos
Client Email/Phone:	<a href="mailto:dburgos@artemislifestyles.com">dburgos@artemislifestyles.com</a>
Service Period:	2020 – Current
Project Manager:	Eddie Padua

### Services Provided

- ✓ Amenities Management
- ✓ Full-service Janitorial
- ✓ On-demand Repairs





## Project Experience: **Bezos Academy**

### Overview

Berman began servicing the Orlando location of Bezos Academy, providing reliable field maintenance support across the campus. Our scope includes regular inspections, repairs, preventative maintenance, and immediate response to facilities-related concerns to ensure the school operates in a safe and welcoming environment for students and staff.

Our dedicated maintenance technician serves as the daily on-site point of contact, proactively identifying issues before they escalate and coordinating repairs efficiently. Services performed range from playground equipment upkeep and classroom fixture repairs to HVAC filter replacements and minor plumbing or electrical fixes.

Berman's hands-on, self-performing model ensures the Academy receives high-touch service with fast response times and consistent quality control.

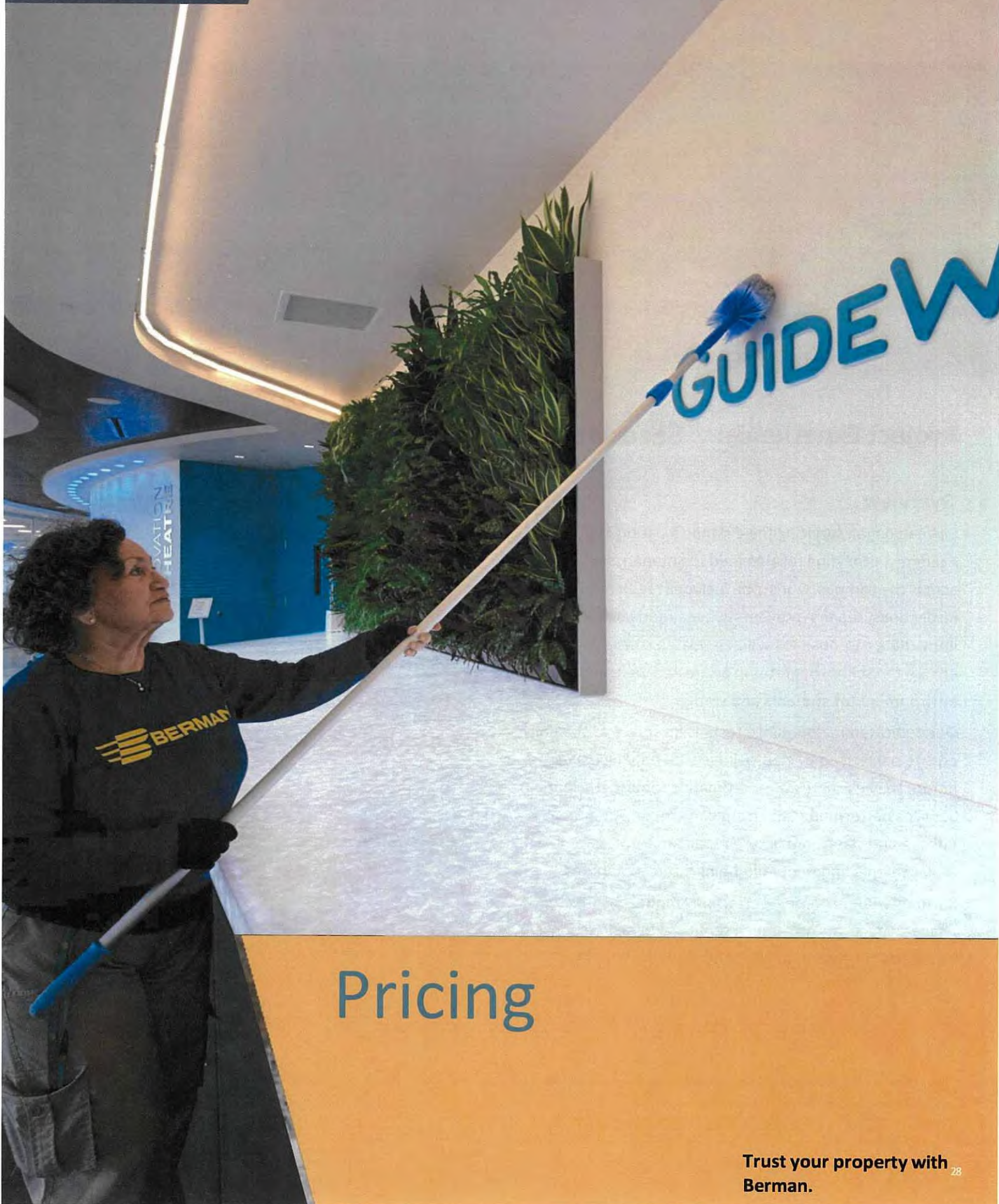
### Project Details

Project Name:	<b>Bezos Academy</b>
Client Contact:	<b>Aaron Bork.</b>
Client Email/Phone:	<b>aaron.bork@bezosacademy.org</b>
Service Period:	<b>2023 – Current</b>
Project Manager:	<b>Eddie Padua</b>

### Services Provided

- ✓ **On-demand Repairs**





## Pricing



## Scope of Services

Berman shall provide staff to complete all services outlined below Harmony CDD.

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Manage all maintenance and amenity operations for the District, and do so in compliance with all applicable laws, ordinances, codes, District rules and District policies;

Manage the entire field management and maintenance staff to ensure mission completion, and oversee workplace operations to maintain and improve effectiveness and efficiency;

Available twenty-four hours a day, seven days a week to handle emergencies with a phone response time of no more than thirty minutes and no more than two hours to arrive on site if needed on site;

Assisting the District's Buck Lake Advisory Committee;

Oversee and ensure continuous and consistent District-related communications for residents (including board meetings, common property issues, etc.); interact with residents and guests on a day-to-day basis;

Train all staff to treat residents and guests with respect and to provide the best possible customer service to residents and guests to ensure a safe and comfortable environment;

Manage and execute the field management and maintenance budget adopted by the Board and provide monthly updates of all related expenditures;

Ensure Facilities are in good and safe condition for residents at all times;

Report any major issues or cost overruns promptly to the District Manager and the District Board Chair;

Ensure all subcontracts and outside vendors meet all contract terms and conditions as outlined, provide quality services, and evaluate their performance (including, but not limited to, janitorial, security, lifeguard, lake maintenance, and landscape maintenance);

Oversee the District's landscape maintenance contractor and arborist, including approving contractor monthly and weekly plans, validating work performed meets contract requirements, approving invoices from the vendors after determining that the goods or services were received in good condition, and confirming all landscaping meets District Landscape Standards including ensuring trees remain healthy and pruned/trimmed, dead trees are replaced quickly, all shrubs and flowers are kept healthy and replaced as needed, all sod remains healthy and is replaced quickly when needed, all mulched areas are kept clean of debris and trash and irrigation systems are fully functional;

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✓ **Field Management  
and Maintenance  
Services**



## Scope of Services

Berman shall provide staff to complete all services outlined below Harmony CDD.

---

✓ **Field Management  
and Maintenance  
Services**

Developing, executing, updating and publishing the Harmony CDD Landscaping Standards each year;

Oversee the District's aquatic plant maintenance contractor, including approving any invoices from the vendors after determining that the goods or services were received in good condition and consistently monitor all community ponds for algae and seepage/bank issues;

Oversee the District's contractors performing emergency repairs and other services, including approving any invoices from the vendors after determining that the goods or services were received in good condition and coordinate emergency repairs (e.g., broken sprinkler heads, broken or lifted sidewalks, etc.);

Negotiate purchasing and potential bidding of contracted services, process and manage work orders, as needed, and review all invoices.

Present professional "to the point" updates at each District board meeting to include expenditures, key issues, suggestions for improvements, etc.;

Monitor and enforce the District's written rules and policies, including its Rules and Policies (2019), as it is updated from time-to-time (the "Amenity Rules"), as well as ensuring all personnel are familiar with the Amenity Rules;

Document all complaints, injuries, and maintenance issues in a specified logbook and report all issues to the District Manager and/or District Counsel, as appropriate or necessary;

Report major repairs to District property and Facilities (outside of landscape contract) in a timely manner and coordinate such repairs;

Report professionally at each District Board meeting with monthly management report and with status of all repairs completed, and provide suggestions of key items needed to enhance the community;

Assess and advise the District of any necessary repairs, extraordinary cleaning, or replacement items that may be required due to "normal wear and tear," "acts of God," or vandalism, and secure cost estimates for same;

Recommend and implement (where applicable) on an ongoing basis, capital equipment replacements, additions, and operational improvements;

Provide monthly written reports summarizing operations and participation levels, and describing any other areas or items of interest pertinent to the Amenities;

Prepare an estimated annual operating budget by April 15, including both anticipated revenues and expenses, for the District;

---



## Scope of Services

Berman shall provide staff to complete all services outlined below Harmony CDD.

✓ **Field Management  
and Maintenance  
Services**

Have expansive knowledge of Microsoft Outlook, Word, Excel, Power Point;

Provide, implement and administer a computer-based tracking system for maintenance tasks, whether generated by management, board members or residents, which is accessible by board members at all times. At a minimum, the system shall include the date the maintenance item was requested or brought to the attention of management, the source of the maintenance concern and contact information if a resident, the schedule for completion of the maintenance task, the date the maintenance task was completed, and the date the resident or board member was notified of completion of the maintenance task (if requested by a resident or board member);

Log resident contacts into the computer based tracking system established by the District Manager, and coordinate with the District Manager regarding same;

Responsible for day-to-day operations, development and execution of standard operation policies and procedures;

Supervise any staff hired by Contractor or the District necessary to perform the Maintenance Management duties contained herein;

Maintain and manage preventative maintenance records, inventories, purchases, warranties, regular maintenance and inspections for the Facilities, as needed including fire inspections, pest control, mechanical systems, security alarms;

Oversee maintenance and operation of the security systems and structures installed at the Facilities, and respond to calls and other items from the security provider;

Respond to and document any incident or accident reports that occur at the Amenity Facilities, and forward them appropriately;

Administer the card access program for residents, guests and others using the District's Amenity Facilities, including checking patron access cards, ensuring new patrons execute applicable forms, and monitoring the District's guest and visitor policies all in accordance with the District Amenity Rules;

Provide orientations for new patrons using the Amenities Facilities, including any Amenities equipment;

Administer temporary suspensions of privileges to use the amenity facilities in accordance with the District's Amenities Rules.

Recommend, and prepare if requested, up-to-date rules and policies for the Amenities, and make suggestions for new or revised rules for the Amenities when appropriate;

Develop and implement, in consultation with, and to the satisfaction of, the District, an emergency action plan setting forth a policy for the Amenities designed to protect staff and authorized patrons from serious injury, property loss, or loss of life, in the event of an actual or potential major disaster;



## Scope of Services

Berman shall provide staff to complete all services outlined below HarmonyCDD.

---

Maintain up-to-date information on the community website.

Manage and operate the Amenities Facilities to provide a high-quality experience for patrons with a hospitality focus; consistently and effectively creates a flexible and interactive lifestyle for Amenities Facilities patrons;

Manage and hire personable, articulate, well-groomed and highly motivated individuals as needed for tasks outlined herein and select events throughout the year;

Provide seamless day-to-day Amenities Facilities operation creating a comfortable and safe environment;

Oversee and develop boating activities at Buck Lake Dock and Boathouse, and be responsible for maintenance of equipment; administrating the Online Resident Boat Reservation System; administrating the Online Resident Boat Reservation System;

Maintain an inventory of, and order and stock, when necessary, supplies and equipment for the operation of the Amenities;

Establish and maintain tracking and reporting procedures for use of the Amenities Facilities use, including daily and monthly use, and trends in use

Managing staff, if any, for Swim Amenities, in order to:

deliver the services associated with the Swim Amenities at a level consistent with the District's annual budget; and

ensure that the District's operation and maintenance of the Swim Amenities are in compliance with all requirements of applicable law, including but not limited to Florida's Public Pool Code, Chapter 64E of the Florida Administrative Code, as well as any County-approved safety plan(s).

To the extent required by law and requested by the District, the Contractor shall employ lifeguards who have the current requisite certificate from the American Red Cross (or an acceptable alternative from another provider), undergo periodic in-service training and otherwise meet any other legal requirements, and maintain documentation of such certification and training.

Contractor shall promptly investigate and provide a full written report as to all accidents or claims for damage relating to the Swim Amenities, including any injuries or damage or destruction of property, and shall cooperate and make any and all reports required by any insurance company or the District in connection therewith.

Arranging for maintenance and repair of fleet of vehicles/equipment, and replenishing gas and diesel, to minimize downtime;

---

✓ **Field Management  
and Maintenance  
Services**



## Scope of Services

Berman shall provide staff to complete all services outlined below Harmony CDD.

✓ **Field Management  
and Maintenance  
Services**

Managing and controlling the resident Pool/Dock Access ID Card System;

Maintaining and emptying dog potty stations throughout the week;

Maintaining all sidewalks for which the CDD is responsible, including power washing and grinding;

Maintaining the cleanliness of the 192 median (i.e., removing road debris, etc.);

Supervise overall maintenance of all District Ponds and Conservation Areas;

Maintain all Facilities, including both parks, common areas, etc.; complete minor repairs to the Amenity Facilities for plumbing, electrical, interior and exterior painting, fence paint touch-up, clean gutters, entrance/exit gates, etc.;

Responsible for daily repairs to and upkeep of all District common areas, including trash pick-up around the community;

Repair equipment as able and promptly report the need for any repairs not able to be performed; monitor condition of all doors, adjoining fencing and gates, and resolve any problems, either through repairs or adjustments, or securing services of door/gate contractor; touch-up painting as needed; control cobwebs and prevent other debris from accumulating on exterior walls; and replace interior lights and air conditioner filters as needed. (Contractor shall be reimbursed by the District for the purchase of replacement light bulbs and air conditioning filters upon presentation of support for such reimbursement to the District's satisfaction);

Survey all community light structures weekly and replace as needed or call utility provider for replacement of major community lights;

Monitor all roads for potholes or drainage issues, sidewalks, curbs, street signs, monuments, and informational signs, and report to the appropriate groups for repair;

Pressure wash all pool decks, monuments, hardscape, curbs, sidewalks, sports courts at least twice per year, or more often if needed;

Empty waste receptacles and pick up debris around all entrances, swimming pool decks, parks, playgrounds, and sports courts.

Maintain swimming pool decks by blowing off entire pool deck and splash pad, and arranging furniture, adjusting umbrellas, and cleaning grills (if provided).



## Scope of Services

Berman shall provide staff to complete all services outlined below Harmony CDD.

---

✓ **Field Management  
and Maintenance  
Services**

Oversee and maintain community parks, dock, and watercraft operations by managing reservations, checking condition of deck, storage bins, etc., and training residents for proper operation of the District watercraft;

Clean all outdoor furniture;

Maintain and assess playground equipment for safety issues on a regular basis;

Daily general inspection of the Amenities Facility at both (i) the beginning of each day, which shall include but not be limited to, picking up loose trash, inspecting for property damage, arranging furniture, ensuring that door locks and/or gate latches are secure and functional, ensuring that any equipment is clean, functional, and free from safety hazards; and (ii) at the end of each day, which shall include but not be limited to, ensure all doors and windows are secure, and the card access system is engaged, and ensure that the gate latches are secure at the pools, and other facilities;

In the event of forecasted inclement weather, secure outdoor furniture and take other appropriate steps to help prevent loss and damage;

Maintain the general appearance of all indoor spaces by vacuuming, dusting, furniture positioning, cleaning all tiled areas and cleaning windows and bathrooms.

Window cleaning includes window ledges and blinds.

Bathroom cleaning includes – but is not limited to - all toilets, bases behind toilets, counters, mirrors and shower stalls. Soap dispensers shall be cleaned and filled when necessary. Paper product dispensers shall be restocked as needed (costs of paper products and soap shall be included in the flat annual fee proposal.)

Dusting includes window ledges and blinds, furniture, baseboards, countertops and lights.

Cleaning of tiled areas includes dust mopping, damp mopping and baseboards.

Storage closets shall be kept in an orderly condition. Equipment and cleaning supplies shall be properly labeled and stored.

District shall furnish the necessary cleaning equipment and supplies for the provision of the janitorial services described herein. Should extraordinary cleaning services be required (as agreed to in writing by the District Board or District Manager), such special janitorial services and/or equipment/supplies shall be billable to the District.

---



## Scope of Services

Berman shall provide staff to complete all services outlined below Harmony CDD.

Contractor shall be responsible for Swim Amenities to be maintained to be safely used by patrons, enforcing the Amenities Rules, performing light pool area cleaning, managing pool staff, if any, and handling phone calls. The Proposer shall ensure the staffing schedule includes one employee to be onsite until 30 minutes after pool closure, seven (7) days per week.

Responding to first aid situations

Provide a Certified Pool Operator;

Check pool water quality and complete equivalent to DH Form 921 3/98 Swimming Pool Report, as required by Chapter 64E-9.004(13), FAC, per site visit.

Conduct necessary tests for proper pool chemicals as required in order to maintain water quality levels within requirements of Chapter 64E-9.004(1)(d).

Operate filtration and recirculation systems, backwashing as needed. Clean all strainers. Maintain pool at proper water level, and maintain filtration rates. Check valves for leaks, as well as other components, and maintain in proper condition.

Manually skim, brush and vacuum pools a minimum of three (3) days per week, or as needed.

Advise the District of any necessary repairs, cleaning, or replacement items required due to "normal wear & tear," "acts of God," or vandalism. Such repairs shall be billed separately, upon approval of the District Board or District Manager.

All chemicals required for cleaning the pools, including, but limited to, special treatment of stains, metals sequestering, foam removal, oil removal, phosphate and nitrate removal, mustard and black algae treatment, and super chlorination, shall be used as needed and billed separately. Additional service and/or chemicals required due to natural disasters or gale-force winds (or stronger) shall be billed separately as well. The District shall purchase directly, all pool chemicals necessary to comply with the above.

Provide a dedicated commercial-duty pool vacuum kept on site to provide improved response by on-site staff in the event of emergencies, at no additional cost to the District.


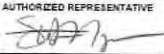
The Contractor shall conduct visual inspections daily of all pool equipment, devices, splash pad, restrooms, and lighting.

✓ **Field Management  
and Maintenance  
Services**



## Insurance

Berman acknowledges that we carry and maintain the required insurance coverage and limits as set forth in the RFP. We also acknowledge that Harmony CDD, its parent, and affiliated companies shall be listed as additional insured(s) by endorsement and loss payee (as applicable) with respect to the above policies (excepting Workers' Compensation) on a primary and non-contributory basis. There shall also be a waiver of subrogation in favor of all the Harmony CDD entities under all of the forgoing policies. Proof of Certificates of Insurance and applicable additional insured endorsements must be provided and updated prior to expiration.

		BERMCON-03	MCMULLENW																				
<b>CERTIFICATE OF LIABILITY INSURANCE</b>		DATE (MM/DD/YYYY) 5/5/2025																					
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<b>PRODUCER</b> Insurance Office of America 1855 West State Road 434 Longwood, FL 32750		<b>CONTACT</b> Michele Wise PHONE (A/C, No. Ext): (321) 460-1235 FAX (A/C, No.): EMAIL: michele.wise@io3usa.com																					
<b>INSURED</b> Berman Construction, LLC 6820 Marwick Lane, Suite 150 Orlando, FL 32827		<b>INSURER(S) AFFORDING COVERAGE</b> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th>INSURER A - Contractors Bonding and Insurance Company</th> <th>NAIC #</th> </tr> <tr> <td>INSURER B - Mt. Hawley Insurance Company</td> <td>37206</td> </tr> <tr> <td>INSURER C - Technology Insurance Company, Inc.</td> <td>42376</td> </tr> <tr> <td>INSURER D:</td> <td></td> </tr> <tr> <td>INSURER E:</td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> </tr> </table>		INSURER A - Contractors Bonding and Insurance Company	NAIC #	INSURER B - Mt. Hawley Insurance Company	37206	INSURER C - Technology Insurance Company, Inc.	42376	INSURER D:		INSURER E:		INSURER F:									
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<p>THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.</p>																							
INSTR.	TYPE OF INSURANCE	ADDITIONAL INSURED	POLICY NUMBER      POLICY EFF. DATE (MM/DD/YYYY)      POLICY EXP. DATE (MM/DD/YYYY)      LIMITS																				
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PER-ACCIDENT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:		RKA0400894      1/19/2025      11/1/2025 <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>EACH OCCURRENCE</td><td>\$ 1,000,000</td></tr> <tr><td>DAMAGE TO RENTED PREMISES (Per occurrence)</td><td>\$ 300,000</td></tr> <tr><td>MED. EXP. (Any one person)</td><td>\$ 5,000</td></tr> <tr><td>PERSONAL &amp; ADV. INJURY</td><td>\$ 1,000,000</td></tr> <tr><td>GENERAL AGGREGATE</td><td>\$ 2,000,000</td></tr> <tr><td>PRODUCTS - COMPOUND AGG.</td><td>\$ 2,000,000</td></tr> <tr><td>COMBINED SINGLE LIMIT (Per accident)</td><td>\$</td></tr> <tr><td>BODILY INJURY (Per person)</td><td>\$</td></tr> <tr><td>BODILY INJURY (Per accident)</td><td>\$</td></tr> <tr><td>PROPERTY DAMAGE (Per accident)</td><td>\$</td></tr> </table>	EACH OCCURRENCE	\$ 1,000,000	DAMAGE TO RENTED PREMISES (Per occurrence)	\$ 300,000	MED. EXP. (Any one person)	\$ 5,000	PERSONAL & ADV. INJURY	\$ 1,000,000	GENERAL AGGREGATE	\$ 2,000,000	PRODUCTS - COMPOUND AGG.	\$ 2,000,000	COMBINED SINGLE LIMIT (Per accident)	\$	BODILY INJURY (Per person)	\$	BODILY INJURY (Per accident)	\$	PROPERTY DAMAGE (Per accident)	\$
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	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO OWNED <input type="checkbox"/> AUTO'S ONLY <input type="checkbox"/> SCHEDULED <input type="checkbox"/> HIRED AUTO'S ONLY <input type="checkbox"/> NON-OWNED		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>COMBINED SINGLE LIMIT (Per accident)</td><td>\$</td></tr> <tr><td>BODILY INJURY (Per person)</td><td>\$</td></tr> <tr><td>BODILY INJURY (Per accident)</td><td>\$</td></tr> <tr><td>PROPERTY DAMAGE (Per accident)</td><td>\$</td></tr> </table>	COMBINED SINGLE LIMIT (Per accident)	\$	BODILY INJURY (Per person)	\$	BODILY INJURY (Per accident)	\$	PROPERTY DAMAGE (Per accident)	\$												
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B	<input checked="" type="checkbox"/> UMBRELLA LIAB. <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB. <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED. <input checked="" type="checkbox"/> RETENTION \$ 0		XGA0002320      1/7/2025      1/7/2025 <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>EACH OCCURRENCE</td><td>\$ 5,000,000</td></tr> <tr><td>AGGREGATE</td><td>\$ 5,000,000</td></tr> </table>	EACH OCCURRENCE	\$ 5,000,000	AGGREGATE	\$ 5,000,000																
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C	<b>WORKERS COMPENSATION AND EMPLOYER'S LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/OWNER EXCLUDED? (Mandatory in NH) If yes, specify under DESCRIPTION OF OPERATIONS below	Y/N Y	TWC4522080      11/1/2024      11/1/2025 <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td><input checked="" type="checkbox"/> PER STATUTE</td> <td><input type="checkbox"/> OTHER</td> </tr> <tr><td>E.L. EACH ACCIDENT</td><td>\$ 1,000,000</td></tr> <tr><td>E.L. DISEASE - EA/EMPLOYEE</td><td>\$ 1,000,000</td></tr> <tr><td>E.L. DISEASE - POLICY LIMIT</td><td>\$ 1,000,000</td></tr> </table>	<input checked="" type="checkbox"/> PER STATUTE	<input type="checkbox"/> OTHER	E.L. EACH ACCIDENT	\$ 1,000,000	E.L. DISEASE - EA/EMPLOYEE	\$ 1,000,000	E.L. DISEASE - POLICY LIMIT	\$ 1,000,000												
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A	Equipment Floater		RKA0400894      1/19/2025      11/1/2025 Catastrophe Limit: 371,309																				
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)																							
<b>CERTIFICATE HOLDER</b>		<b>CANCELLATION</b>																					
(For Informational Purposes Only)		SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 																					

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## Insurance

Berman acknowledges that we carry and maintain the required insurance coverage and limits as set forth in the RFP. We also acknowledge that Harmony CDD, its parent, and affiliated companies shall be listed as additional insured(s) by endorsement and loss payee (as applicable) with respect to the above policies (excepting Workers' Compensation) on a primary and non-contributory basis. There shall also be a waiver of subrogation in favor of all the Harmony CDD entities under all of the forgoing policies. Proof of Certificates of Insurance and applicable additional insured endorsements must be provided and updated prior to expiration.

ACORD		BERMCON-03	MCMULLENW
CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY) 5/5/2025	
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<b>PRODUCER</b> Insurance Office of America 1856 West State Road 434 Longwood, FL 32750		<b>CONTACT NAME:</b> Michele Wise <b>PHONE (A/C, Hrs, Ext):</b> (321) 460-1235 <b>FAX (A/C, Hrs):</b> <b>E-MAIL ADDRESS:</b> michele.wise@ioausa.com	
<b>INSURED</b> Berman Construction, LLC 6820 Marwick Lane, Suite 150 Orlando, FL 32827		<b>INSURER(S) AFFORDING COVERAGE</b> INSURER A: Travelers Casualty Insurance Company of America INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:	
<b>COVERAGES</b>		<b>CERTIFICATE NUMBER:</b> BA-1W532805-25-42-G	
<b>REVISION NUMBER:</b>		19046	
<p>THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.</p>			
RISR	TYPE OF INSURANCE	ADDITIONAL INSURED	LIMITS
1	<input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR <input type="checkbox"/> GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PROJ. <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:		EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Per occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMPROP AGG \$ COMBINED SINGLE LIMIT (Per occurrence) \$ 1,000,000
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY	BA-1W532805-25-42-G	1/19/2025 1/19/2026 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ PIP \$ 10,000
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> DED <input type="checkbox"/> RETENTIONS \$		EACH OCCURRENCE \$ AGGREGATE \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N/A	PER STATUTE <input type="checkbox"/> OTHER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
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## Sample Inspection Report

Sample

Los Academy

FL002 - Q1 - PM SITE VISIT

06/11/2021 12 PM

Identified 26 Issues

## Roof - Inspection and condition - Fair

Assigned To : N/A

Comments :

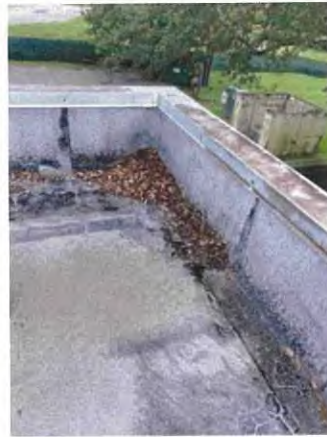
- Request quote to soft wash and clear debris; drains were flushed on-site to confirm there were no blockages



## Roof Debris And Drains

Assigned To : N/A

Comments : N/A







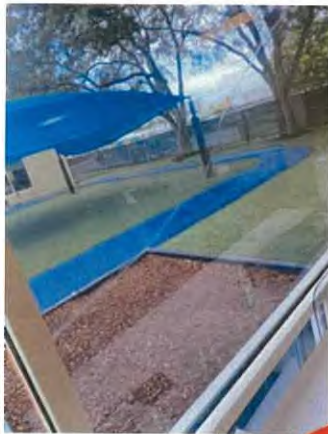
---

### Playground - Canopies (3)

Assigned To : N/A

Comments :

- Quote requested to replace canopies with new, client to confirm specs



---

### HVAC - Thermostats Operational

Assigned To : N/A

Comments :

- Quote requested to replace all TStats to newer models



### HVAC - System Operational

Assigned To : N/A

Comments :

- Full quarterly PM to be performed - filters, belts and motors. Unit: AP48001C serial: WIC8620917



### Gutters and Downspouts - Clear of Debris/Clogs

Assigned To : N/A

Comments :

- Some gutters were bent at outlet, but operational



COPY



#### Fire Systems - Backflow and Hydrants

Assigned To : N/A

Comments :

- All inspected and no leaks; quote needed to repaint and refresh all





---

**Site - Parking Lot Needs Restripe - Poor Condition**

Assigned To : N/A

Comments :

- Quote needed to restripe throughout



---

**Site - Parking Lot Curbs - Fair Condition**

Assigned To : N/A

Comments :

- Quote needed to clean and repaint curbs throughout





---

**Dumpster Area - Clean And Gate Operational**

Assigned To : N/A

Comments :

- Debris around to be picked up regularly



---

**Door - Areas Around Downspouts Need To Be Pressure Washed**

Assigned To : N/A

Comments : N/A



## Emergency Lights (2) - Not Working

Assigned To : N/A

Comments :

- Quote needed to replace



## Bathrooms - All Operational And Clean

Assigned To : N/A

Comments :

- No clogs or obstructions





Assigned To : N/A

COPY

Comments :

- Quote needed to replace p-traps in classrooms due to minor leaks



---

### Bathroom - Floors Clean

Assigned To : N/A

Comments :

- Quote needed to recaulk toilet seal and recommend tile steam clean



---

### Floor Classroom and Hallways In Good Condition

Assigned To : N/A

Comments : N/A

COPY



---

**Fire Extinguishers - Certified 1/2022 (good until 1/2024)**

Assigned To : N/A

Comments : N/A



---

**Lights - Several Out**

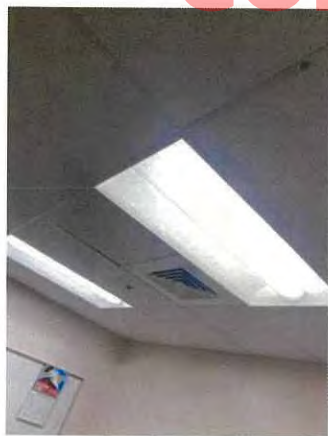
Assigned To : N/A

Comments :

- Quite requested to replace around 40 fixtures from florescent to LED



COPY



---

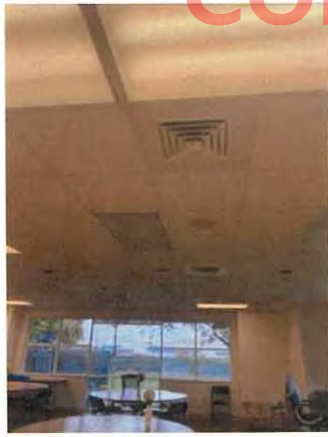
**Lights - Several Out**

Assigned To : N/A

Comments : N/A



COPY



---

**Kitchen - All Piping Cleared And Piped Correctly**

Assigned To : N/A

Comments : N/A



---

**Ceiling - Broken Ceiling Grill**

Assigned To : N/A

Comments :

- Quote to be replace





**Playground - Fence Line Clear And Intact**

Assigned To : N/A

Comments : N/A



**Cameras - Operational and Clear of Debris**

Assigned To : N/A

Comments : N/A



**Building Exterior - Cobwebs and Spiders Observed**

Assigned To :

Comments :

Quote to pressure wash exterior of building



---

**Exit Sign - Out and Needs to Be Replaced**

Assigned To : N/A

Comments : N/A



---

**Bezos Boca Location - Entrance**

Assigned To : N/A

Comments : N/A





## Harmony CDD Field Management and Maintenance Services

The below is in accordance with the scope of work contained in this proposal.

SERVICE	COST	WHAT'S INCLUDED	NOTES
GENERAL MANAGER	\$109,650.00-annually	40 hours per week, Monday -Friday	To include all tax, insurance, benefits and overhead
AMENITY MANAGER	\$90,300.00-annually	40 hours per week, Wednesday – Sunday	To include all tax, insurance, benefits and overhead
MAINTENANCE TECHNICIAN	\$72,446.40-annually	40 hours a week, Monday- Friday	To include all tax, insurance, benefits and overhead
FIELD SERVICE MANAGER	\$20,000-annually	Part- Time, 3 Inspections	To include all tax, insurance, benefits and overhead
FACILITIES ATTENDANT	\$38,638.08-annually	32 hours per week, Thursday - Sunday	To include all tax, insurance, benefits and overhead
LIFEGUARDS	\$35.00-per hour	Dawn- Dusk	To include all tax, insurance, benefits and overhead

Under penalties of perjury under the laws of the State of Florida, I declare that I have read the foregoing Affidavit of Acknowledgments and that the foregoing is true and correct.

Dated this 29 day of July, 2025.

Proposer: Berman Construction LLC

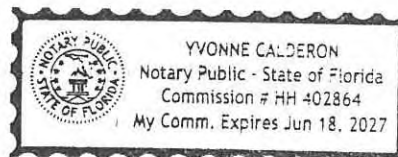
By: Samantha Sharenow

Title: Executive Vice President

STATE OF FLORIDA  
COUNTY OF ORANGE

The foregoing instrument was acknowledged before me this 29 day of July, 2025, by Samantha Sharenow of Berman, who is personally known to me or who has produced \_\_\_\_\_ as identification, and did [ ] or did not [ ] take the oath.

Yvonne Calderon  
Notary Public, State of Florida  
Print Name: YVONNE CALDERON  
Commission No.: JUNE 18, 2027  
My Commission Expires: # HH 402864





# Proposal Forms

## 8. PROPOSAL FORMS

### 8.A.

#### AFFIDAVIT OF ACKNOWLEDGMENTS

STATE OF Florida  
COUNTY OF Orange

Before me, the undersigned authority, appeared the affiant, Samantha Sharenow, and having taken an oath, affiant, based on personal knowledge, deposes and states:

1. I am over eighteen (18) years of age and competent to testify as to the matters contained herein. I serve in the capacity of Executive Vice President for Berman ("Proposer"), and am authorized to make this Affidavit of Acknowledgments on behalf of Proposer.

2. I assisted with the preparation of, and have reviewed, the Proposer's proposal ("Proposal") provided in response to the Harmony Community Development District Request for Proposals for Field Management and Maintenance Services. All of the information provided therein is full and complete, and truthful and accurate. I understand that intentional inclusion of false, deceptive or fraudulent statements, or the intentional failure to include full and complete answers, may constitute fraud; and, that the District may consider such action on the part of the Proposer to constitute good cause for rejection of the proposal.

3. I do hereby certify that the Proposer has not, either directly or indirectly, participated in collusion or proposal rigging.

4. The Proposer agrees through submission of the Proposal to honor all pricing information ninety (90) days from the opening of the proposals.

5. The Proposer acknowledges the receipt of the complete Request for Proposals as provided by the District and as described in the Table of Contents, as well as the receipt of the following Addendum Numbers: 1.

6. The Proposer authorizes and requests any person, firm or corporation to furnish any pertinent information requested by the Harmony Community Development District, or its authorized agents, deemed necessary to verify the statements made in the Proposal, or regarding the ability, standing, integrity, quality of performance, efficiency, and general reputation of the Proposer.

[Signature page to follow]

**8.B.****SWORN STATEMENT UNDER SECTION 287.133(3)(a),  
FLORIDA STATUTES, REGARDING PUBLIC ENTITY CRIMES**

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

1. This sworn statement is submitted to Harmony Community Development District.
2. I am over eighteen (18) years of age and competent to testify as to the matters contained herein. I serve in the capacity of Executive Vice President for Berman Construction LLC ("Proposer") and am authorized to make this Sworn Statement on behalf of Proposer.
3. Proposer's business address is 6820 Marwick Lane Ste. 150 Orlando, FL 32827  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
4. Proposer's Federal Employer Identification Number (FEIN) is 27-2114260  
  
(If the Proposer has no FEIN, include the Social Security Number of the individual signing this sworn statement: \_\_\_\_\_.)
5. I understand that a "public entity crime" as defined in Paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
6. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.



1. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), Florida Statutes, means:
  - a. A predecessor or successor of a person convicted of a public entity crime; or,
  - b. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.
2. I understand that a "person" as defined in Paragraph 287.133(1)(e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.
3. Based on information and belief, the statement which I have marked below is true in relation to the Proposer submitting this sworn statement. (Please indicate which statement applies.)

X Neither the entity submitting this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, nor any affiliate of the entity, have been charged with and convicted of a public entity crime subsequent to July 1, 1989.

\_\_\_\_\_ The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members or agents who are active in management of the entity or an affiliate of the entity, has been charged with and convicted of a public entity crime subsequent to July 1, 1989, AND (please indicate which additional statement applies):

\_\_\_\_\_ There has been a proceeding concerning the conviction before an Administrative Law Judge of the State of Florida, Division of Administrative Hearings. The final order entered by the Administrative

Law Judge did not place the person or affiliate on the convicted vendor list.  
(Please attach a copy of the final order.)

\_\_\_ The person or affiliate was placed on the convicted vendor list. There has been a subsequent proceeding before an Administrative Law Judge of the State of Florida, Division of Administrative Hearings. The final order entered by the Administrative Law Judge determined that it was in the public interest to remove the person or affiliate from the convicted vendor list. (Please attach a copy of the final order.)

\_\_\_ The person or affiliate has not been placed on the convicted vendor list. (Please describe any action taken by or pending with the Florida Department of Management Services.)

Under penalties of perjury under the laws of the State of Florida, I declare that I have read the foregoing Sworn Statement under Section 287.133(3)(a), Florida Statutes, Regarding Public Entity Crimes and all of the information provided is true and correct.

Dated this 29 day of July, 2025.

Proposer: Berman Construction LLC

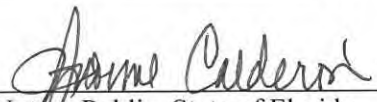
By: Samantha Sharenow

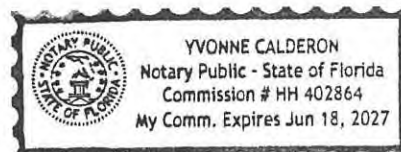


Title: Executive Vice President

STATE OF FLORIDA  
COUNTY OF ORANGE

The foregoing instrument was acknowledged before me this 29 day of July, 2025, by Samantha Sharenow Berman, who is personally known to me or who has produced \_\_\_\_\_ as identification, and did [ ] or did not [ ] take the oath.

  
Notary Public, State of Florida  
Print Name: YVONNE CALDERON  
Commission No.: HH 402864  
My Commission Expires: JUNE 18, 2027





**8.C.**  
**GENERAL PROPOSER INFORMATION**

- Proposer General Information:*

Proposer Name Berman Construction LLC

Street Address 6820 Marwick Lane Ste. 150

P. O. Box (if any) \_\_\_\_\_

City Orlando State FL Zip Code 32827

Telephone 407.522.7140 x702 Fax no. 866.575.5341

1st Contact Name Stella Miller Title Business Development Mgr.

2nd Contact Name Eddie Padua Title General Manager

Parent Company Name (if any) \_\_\_\_\_

Street Address \_\_\_\_\_

P. O. Box (if any) \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Telephone \_\_\_\_\_ Fax no. \_\_\_\_\_

1st Contact Name \_\_\_\_\_ Title \_\_\_\_\_

2nd Contact Name \_\_\_\_\_ Title \_\_\_\_\_

- Company Standing:*

Proposer's Corporate Form: Corporation  
(e.g., individual, corporation, partnership, limited liability company, etc.)

In what State was the Proposer organized? FL Date 3/15/2010

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

If no, please explain\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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

If no, please explain\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

- *What are the Proposer's current insurance limits?*

General Liability	\$ <u>1,000,000</u>
Automobile Liability	\$ <u>1,000,000</u>
Workers Compensation	\$ <u>1,000,000</u>
Expiration Date	<u>11/1/2025</u>

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

General Contractor- CGC 1518721-Good Standing

Certified Pest Control Operator – Good Standing

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



**8.D.**  
**PERSONNEL**

- *List the location of the Proposer's office, which would perform work for the District.*

Street Address 6820 Marwick Lane Ste. 150

P. O. Box (if any) \_\_\_\_\_

City Orlando State FL Zip Code 32827

Telephone 407.522.7140 Fax no. 866.575.5341

1st Contact Name Stella Miller Title Business Development Mgr

2nd Contact Name Eddie Padua Title General Manager

- *Officers and Supervisory Personnel – Please complete the pages that follow at the end of this Part regarding the Proposer's Officers and Supervisory Personnel, and attach resume for any Supervisory Personnel listed.*
- *Subcontractors – Does the Proposer intend to use any subcontractors in connection with the work? Yes \_\_\_ No X For each subcontractor, please provide the following information (attach additional sheets if necessary):*

Subcontractor Name \_\_\_\_\_

Street Address \_\_\_\_\_

P. O. Box (if any) \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Telephone \_\_\_\_\_ Fax no. \_\_\_\_\_

1st Contact Name \_\_\_\_\_ Title \_\_\_\_\_

2nd Contact Name \_\_\_\_\_ Title \_\_\_\_\_

Proposed Duties / Responsibilities: \_\_\_\_\_

Please describe the subcontractor's role in other projects on behalf of the Proposer:

Project Name/Location: \_\_\_\_\_

\_\_\_\_\_

Contact: \_\_\_\_\_ Contact Phone: \_\_\_\_\_

Project Type/Description: \_\_\_\_\_

Dollar Amount of Contract: \_\_\_\_\_

\_\_\_\_\_

Proposer's Scope of Services for Project: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Dates Serviced: \_\_\_\_\_

\_\_\_\_\_

- *Security Measures - Please describe any background checks or other security measures that were taken with respect to the hiring and retention of the Proposer's personnel who will be involved with this project, and provide proof thereof to the extent permitted by law:*

\_\_\_\_\_

All personnel undergo comprehensive background checks. The background checks are conducted in full compliance with all federal, state, and local laws governing privacy and employment.

\_\_\_\_\_



**OFFICERS**PROPOSER: Berman Construction LLCDATE: July 29, 2025

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

NAME	POSITION OR TITLE	RESPONSIBILITIES	INDIVIDUAL'S RESIDENCE CITY, STATE
Martin Berman	Founder & President	Provides executive oversight of all field management and maintenance services, ensuring quality, responsiveness, and alignment with the CDD's goals.	Orlando, FL
Samantha Sharnow	Executive Vice President	Oversees day-to-day field operations and supports strategic planning, ensuring maintenance and management services are delivered efficiently and meet the standards set for the CDD.	Orlando, FL
Eddie Padua	General Manager	Manages daily field activities, supervises on-site teams, and ensures timely, high-quality delivery of maintenance services in alignment with the CDD expectations	Orlando, FL
Edgard Morales	Field Service Manger	Manage and operate the Amenities Facilities to provide a high-quality experience for patrons with a hospitality focus; consistently and effectively creates a flexible and interactive lifestyle for Amenities Facilities patrons	Orlando, FL
Carlos Negron	CDD Irrigation and Landscape Specialist	Maintains and oversees CDD irrigation systems and landscaping, including mowing, trimming, seasonal irrigation adjustments, and system repairs	Orlando, FL





**SUPERVISORY PERSONNEL****WHO WILL BE INVOLVED WITH THE WORK****\*\*NOTE: ATTACH RESUMES OF INDIVIDUALS LISTED BELOW\*\***PROPOSER: Berman Construction LLCDATE: July 29, 2025

INDIVIDUAL'S NAME	PRESENT TITLE	JOB RESPONSIBILITIES	OFFICE LOCATION	% OF TIME TO BE DEDICATED TO THIS PROJECT	YEARS OF EXPERIENCE IN PRESENT POSITION	TOTAL YEARS OF RELATED EXPERIENCE
TBD	General Manager	Manage all maintenance and amenity operations for the District, and do so in compliance with all applicable laws, ordinances, codes, District rules and District policies;	On-Site	100% 40 hours, Monday-Friday	Minimum 2 Years	Minimum 3 years
TBD	Amenities Manager	Manage and operate the Amenities Facilities to provide a high-quality experience for patrons with a hospitality focus; consistently and effectively creates a flexible and interactive lifestyle for Amenities Facilities patrons;	On-Site	100% 40 hours, Wednesday – Sunday	Minimum 2 Years	Minimum 3 years

TBD	Maintenance Tech	Performs daily inspections and repairs of District facilities, including restrooms, hardscapes, doors, fences, lighting, and general infrastructure to ensure safety, cleanliness, and operational integrity.	On-Site	100% 40 hours, Monday - Friday	Minimum 2 years	Minimum 3 years
Edgard Morales	Field Service Manager	Manage and operate the Amenities Facilities to provide a high-quality experience for patrons with a hospitality focus; consistently and effectively creates a flexible and interactive lifestyle for Amenities Facilities patrons;	On-Site	25%	2 years	3 years
TBD	Facilities Attendant	Provide seamless day-to-day Amenities Facilities operation creating a comfortable and safe environment;	On-Site	32 hours per week, Thursday- Sunday	1 year	1 year



TBD	Lifeguards	Contractor shall be responsible for Swim Amenities to be maintained to be safely used by patrons, enforcing the Amenities Rules, performing light pool area cleaning, managing pool staff, if any, and handling phone calls. The Proposer shall ensure the staffing schedule includes one employee to be onsite until 30 minutes after pool closure, seven (7) days per week.	On-Site	Dawn - Dusk	2 years	2 years

**Edgard Morales**

Orlando, FL |

**Field Operations Manager | Maintenance Supervisor**

**Professional Summary**

Results-driven Field Operations Manager with over 12 years of hands-on experience in property maintenance, building systems oversight, and field crew supervision. Trusted leader known for driving operational efficiency, improving response times, and ensuring high-quality service delivery across large-scale residential communities and commercial properties. Demonstrates strong mechanical and troubleshooting knowledge, excellent customer service, and a proactive approach to preventative maintenance and vendor coordination.

**Core Competencies**

- Property & Facilities Maintenance
- Vendor Management & Scheduling
- Resident & Client Relations
- Safety & Code Compliance
- Emergency Response & Repairs
- Work Order & Inventory Management (CMMS)

**Professional Experience**

**Berman – Orlando, FL**

*Field Operations Manager*

January 2019 – Present

- Oversee daily maintenance and repair operations for a portfolio of over 1 million sq. ft. across residential and commercial properties, including CDD and HOA-managed communities.
- Supervise a team of technicians and field staff, ensuring timely work order completion, quality control, and safety compliance.
- Coordinate with vendors and subcontractors for specialized repairs and project work, meeting deadlines and budget goals.
- Inspect building systems such as HVAC, lighting, irrigation, and plumbing to ensure optimal performance and preventative maintenance.
- Serve as primary client contact for maintenance service delivery and emergency response.
- Developed and implemented a streamlined preventative maintenance checklist and digital tracking system, improving efficiency and reducing downtime.



## Carlos Negrón

Orlando, FL | Irrigation Manager

### Professional Summary

Experienced and highly dependable Irrigation Manager with over 10 years of hands-on experience maintaining and optimizing irrigation systems for large-scale commercial, municipal, and HOA communities. Proven track record of improving system efficiency, leading field crews, and ensuring client satisfaction through proactive service and cost-effective water management solutions. Expert in troubleshooting, smart controller programming, and seasonal irrigation strategies tailored to Florida's climate.

### Core Competencies

- Large-Scale Irrigation System Management
- Water Conservation & Cost-Saving Strategies
- Smart Controller Programming (Rain Bird, Hunter, Hydrowise)
- Irrigation System Design & Troubleshooting
- Preventative Maintenance & Emergency Repairs
- Site Audits & Compliance with Local Watering Regulations
- Crew Supervision & Scheduling
- Vendor Coordination & Reporting
- Client Relationship Management
- Landscape & Turf Irrigation Best Practices

### Professional Experience

- Berman – Orlando, FL
- Irrigation Manager (March 2020 – Present)
  - Manages all irrigation services for over 20 HOA and CDD communities across Central Florida, including Harmony CDD and Myrtle Creek Improvement District.
  - Oversees daily operations, scheduling, and performance of the irrigation team, ensuring timely inspections, repairs, and installations.
  - Performs routine site audits to monitor performance, identify inefficiencies, and propose improvements to reduce water usage and prevent landscape damage.
  - Reprograms smart irrigation controllers seasonally and based on weather patterns to meet water restrictions while maintaining landscape health.
  - Collaborates with property managers and internal leadership on project planning, proposal generation, and service reporting.
  - Successfully identified and repaired multiple mainline leaks, preventing property damage and saving thousands in water utility costs.

- Introduced standardized irrigation checklists and weekly service logs, improving accountability and communication across departments.
- GreenSprout Landscaping – Kissimmee, FL
- Irrigation Foreman (June 2014 – February 2020)
  - Led a 4-person crew responsible for irrigation installation, repair, and maintenance at commercial and residential properties.
  - Installed full irrigation systems for new construction developments using PVC piping, valves, and timer systems.
  - Diagnosed faulty wiring, broken valves, and clogged emitters, ensuring rapid repairs and minimal downtime.
  - Trained junior team members in safe excavation, irrigation mapping, and system winterization/summer prep techniques.
  - Regularly liaised with project managers, general contractors, and inspectors to meet project milestones and code compliance.

### **Certifications**

- Certified Irrigation Technician (CIT) – Irrigation Association (2018)
- Backflow Prevention Device Tester – Florida Section AWWA (2021)
- Rain Bird Smart Controller Technician – Certified (2019)
- OSHA 10-Hour Safety Training – Construction (Valid)

### **Education**

Valencia College – Orlando, FL

Certificate in Landscape & Irrigation Technology, 2014



## Brenda Vidal

Haines City, FL 33844  
bvidal707@yahoo.com  
+1 407 729 1655

- Experienced hospitality manager with more than 25 years of successful customer service and support experience
- Proficiently demonstrated ability to problem-solve and troubleshoot while managing support staff
- Proven ability to plan efficiently, maintain, and improve overall customer satisfaction service goals

Authorized to work in the US for any employer

### Work Experience

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#### **Director of Housekeeping**

Sheraton Orlando Lake Buena Vista resort - Orlando, FL  
December 2022 to April 2024

#### **Director of Housekeeping**

Marriott Orlando Downtown - Orlando, FL  
June 2021 to December 2022

#### **Director of Housekeeping**

Avanti International Resort - Orlando, FL  
2019 to 2021

- Carefully maintain and adhere to brand standards at a 652-room resort
- Personally, respond to and address guest concerns to achieve guest satisfaction
- Proficiently manage departmental budget to achieve department goals
- Proficiently perform office functions such as the purchasing of department products and vendor negotiation
- Successfully implement new hiring and training procedures resulting in increased team member satisfaction, better quality of guest experience and reduced turnover
- Proficiently managed office functions ranging from handling phones and effectively addressing guest issues to maintaining files/information systems and developing and facilitating special projects

#### **Assistant Executive Housekeeper**

Four Points by Sheraton  
2017 to 2019

- Effectively supervised 35 housekeepers at a 300+ room hotel
- Proficiently performed leadership and management functions ranging from interviewing, hiring, and managing performance
- Successfully delegated and supervised the tasks of all housekeeping staff for daily, weekly and monthly projects
- Extensively investigated complaints regarding housekeeping to determine and take corrective action
- Quickly reported necessary maintenance issues among departments
- Effectively kept track of inventory to maintain appropriate supply levels

**Executive Housekeeper**

Festiva Orlando Resort

2012 to 2016

- Proficiently performed leadership and management functions ranging from managing inventory, purchasing supplies and kitchen unit appliances for 192 rooms
- Successfully performed general office functions ranging from budget management, billing summaries, and expense reports
- Demonstrated proficiency in OSHA and safety standards
- Established and maintained positive customer service environment

**Front Desk Supervisor/Front Desk Agent**

Festiva Orlando Resort

2010 to 2012

- Successfully managed reservations, guest check ins, checkouts, and forecasting
  - Managed cash, credit card transactions, refunds and inventory levels
  - Answer phones, file, and create projects including daily housekeeping procedures.
  - Proficiently managed office functions ranging from handling phones and effectively addressing guest issues to maintaining files/information systems and developing and facilitating special projects
- Other Hospitality Experience

**Front Desk Assistant Manager/Front Desk Agent**

Oasis Inn Resort

2009 to 2010

**GM Manager/Front Desk Manager**

Goldstar Inn & Suites

2007 to 2009

**Education**

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**Associate of Arts in Business Management**

Monroe College - Bronx, NY

**Skills**

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- Hospitality Leadership Team Management Collaboration Budget Administration Customer Service Bilingual Quality Assurance Inventory Control Staff Training Troubleshooting Time Management Communication
- Hospitality Management
- Supervising Experience
- English
- Forecasting
- Purchasing
- Recruiting
- Logistics



**8.E.**  
**EXPERIENCE**

- *Please provide the following information for each project that is similar to this project, and that you are currently undertaking, or have undertaken, in the past five years. (attach additional sheets if necessary; if there are more than five projects that are responsive, please provide the information requested for the five most similar to the Harmony CDD):*

Project Name/Location: Parker Rd. CDD

Contact: Vivian Carvalho Contact Phone: 407-723-5900

Project Type/Description: Full-service amenity management and field maintenance

Dollar Amount of Contract: \$222,600.00

Your Company's Scope of Services for Project: Our team is responsible for the daily upkeep of all common areas, including parks, trails, and stormwater ponds, as well as pool monitoring, janitorial, and resident support services.

Our amenity manager oversees operations onsite, coordinates community events, enforces facility rules, and acts as a direct liaison between residents and the District. In addition, our maintenance technician performs routine inspections and repairs, ensures landscape contractor accountability, and addresses resident concerns swiftly.

List of subcontractors used: None

Is this a current contract? Yes X No     

Duration of contract: 2025 - Current

Additional Sheet:

Project Name/Location: Laureate Park

Contact: Denise Burgos Contact Phone: 407-705-2190 x172

Project Type/Description: Full-service amenity management and operations

Dollar Amount of Contract: \$1,797,248.76

—

Your Company's Scope of Services for Project: Berman is responsible for the upkeep of the Laureate Park community and, particularly, its aquatic center. Berman acts as an owner's representative for all of Lake Nona's property management and operations and ensures the community's high standards for innovation, technology, and aesthetics are met to deliver an unrivaled experience for all who live in, work in, or visit Lake Nona. This center is quite unique. The resort-style Aquatic Center, located in Laureate Park Village Center, features a splash pool complete with zero-entry admission, deck jets, water cannons, and a 25-foot-tall dumping bucket for hours of fun in the sun. Nearby, a tranquil pool with private cabanas and five junior Olympic lap lanes is perfect for relaxation. Berman maintains all janitorial services for this center, along with landscaping and security, making sure the community's residents and their guests experience a true reflection of the brand of quality and cleanliness experienced throughout Lake Nona.

List of subcontractors used: None

Is this a current contract? Yes X No   

Duration of contract: 2020- Current



Project Name/Location: Monticeto CDD

Contact: Kisha Wagner Contact Phone: 321-777-9460

Project Type/Description: Full-service Field Management and Maintenance Services

Dollar Amount of Contract: \$122,434.00

Your Company's Scope of Services for Project: A dedicated on-site field manager is responsible for overseeing daily operations, ensuring that all community amenities and infrastructure are maintained to the highest standards and in compliance with District policies. Berman handles preventative and routine maintenance of key assets such as stormwater systems, lighting, signage, and common areas, while also managing and monitoring third-party vendors like landscapers and janitorial providers to ensure consistent quality and timely service. In addition, Berman serves as a direct point of contact for residents, addressing concerns related to CDD-maintained areas quickly and professionally. The team also provides project management support for small to mid-sized repair and improvement projects

List of subcontractors used: None

Is this a current contract? Yes X No   

Duration of contract: 2025- Current

Project Name/Location:       Bezoz Academy      

Contact:       Aaron Bork       Contact Phone:       970-333-9078      

Project Type/Description:       Full-service Field Management and Maintenance      

Dollar Amount of Contract:               \$19,500.00      

Your Company's Scope of Services for Project: Berman began servicing the Orlando location of Bezoz Academy, providing reliable field maintenance support across the campus. Our scope includes regular inspections, repairs, preventative maintenance, and immediate response to facilities-related concerns to ensure the school operates in a safe and welcoming environment for students and staff. Our dedicated maintenance technician serves as the daily on-site point of contact, proactively identifying issues before they escalate and coordinating repairs efficiently. Services performed range from playground equipment upkeep and classroom fixture repairs to HVAC filter replacements and minor plumbing or electrical fixes. Berman's hands-on, self-performing model ensures the Academy receives high-touch service with fast response times and consistent quality control.

List of subcontractors used:               None      

Is this a current contract? Yes   X   No       

Duration of contract:               2023- Current



Project Name/Location: Myrtle Creek Improvement District

Contact: Jennifer Walden Contact Phone: 407-723-5900

Project Type/Description: Property management, facilities, and operations

Dollar Amount of Contract: \$36,000.00

Your Company's Scope of Services for Project: Berman provides comprehensive facility and infrastructure support services for Myrtle Creek Improvement District, ensuring consistent upkeep and smooth operation of district-owned assets. Our scope includes landscape maintenance, irrigation system management, janitorial services, and general facility maintenance. We also deliver on-demand repair services for electrical, plumbing, and structural issues, as well as 24/7 emergency response support. Our team is focused on maintaining a clean, safe, and welcoming environment for residents and visitors while helping the District meet long-term asset preservation and operational goals through proactive service and responsive communication.

List of subcontractors used: None

Is this a current contract? Yes X No   

Duration of contract: 2021- Current

- *List the Proposer's total annual dollar value of field management and maintenance services completed for each of the last two (2) years starting with the latest year and ending with the most current year:*

2024 = \$1,833,248.76

\_\_\_\_\_

—

2023 = \$1,797,248.76

\_\_\_\_\_

—

- *Has the Proposer, or any of its principals or supervisory personnel (e.g., owner, officer, or supervisor, etc.), been terminated from any amenity management and/or grounds maintenance management contract within the past 3 years? Yes \_\_\_\_\_ No X For each such termination, please provide the following information (attach additional sheets as needed):*

Project Name/Location: \_\_\_\_\_

\_\_\_\_\_

Contact: \_\_\_\_\_ Contact Phone: \_\_\_\_\_

\_\_\_\_\_

Project Type/Description: \_\_\_\_\_

\_\_\_\_\_

Dollar Amount of Contract: \_\_\_\_\_

\_\_\_\_\_

Scope of Services for Project: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Dates Serviced: \_\_\_\_\_

Reason for Termination: \_\_\_\_\_

\_\_\_\_\_



- *Has the Proposer been cited by OSHA for any job site or company office safety violations in the past five years? Yes \_\_\_ No X*

If yes, please describe each violation, fine, and resolution \_\_\_\_\_

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- *Has the Proposer experienced any worker injuries resulting in a worker losing more than ten (10) working days as a result of the injury in the past five years? Yes \_\_\_ No X*

If yes, please describe each incident \_\_\_\_\_

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- *Please state whether or not the Proposer or any of its affiliates are presently barred or suspended from bidding or contracting on any state, local, or federal contracts? Yes \_\_\_ No X If yes, please provide:*

The names of the entities \_\_\_\_\_  
\_\_\_\_\_

The state(s) where barred or suspended \_\_\_\_\_  
\_\_\_\_\_

The period(s) of debarment or suspension \_\_\_\_\_  
\_\_\_\_\_

Also, please explain the basis for any bar or suspension:

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

None

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

None



**8.F.****SUPPLEMENTAL QUESTIONS**

1. Referencing a specific community(s), what Best Practices are now being implemented due to the suggestion of your company?
  - a. In Lake Nona, where Berman provides full-service field management and maintenance, we've implemented several best practices. One key example is the use of a centralized digital work order and asset management system, which allows for real-time tracking, scheduling, and reporting of all maintenance and amenity operations. This system significantly improved response times, accountability, and budget tracking for the client.  
We also implemented a zone-based maintenance approach—dividing the community into manageable sectors with dedicated teams responsible for each area. This improved service consistency and allowed for more targeted inspections and proactive maintenance.
2. Referencing a specific community(s), how have you suggested the Board address the ongoing maintenance and replacement of community assets?
  - a. Berman recommended implementing a long-term Capital Improvement Plan (CIP) tied to a detailed asset inventory. We worked with the Board to prioritize repairs and replacements based on asset life cycles, usage, and condition. Our team also introduced routine inspection schedules and tracking tools to forecast upcoming needs, helping the Board make data-driven budget decisions and avoid emergency expenses.
3. How many onsite personnel would you suggest being utilized at Harmony for management and for field maintenance activities not already being performed by outside vendors?
  - What types of projects would be handled by such personnel and which projects would be handled by outside vendors?
  - What skill sets and prior experiences would you seek in personnel to achieve the staffing support described in the prior question?
  - For each such individual, what would be the weekly number of hours devoted to the Harmony CDD?
    - a. To effectively support Harmony CDD's management and field maintenance needs not currently performed by outside vendors, we recommend a dedicated onsite team consisting of one General Manager, one Field Supervisor, and four Maintenance Technicians. The General Manager would oversee all field operations, vendor coordination, and serve as the primary liaison with the Board, dedicating approximately 40 hours per week. The Field Supervisor would manage daily task assignments, quality control, and support project planning, also working 40 hours weekly. Each Maintenance Technician would work full-time (40 hours/week), focusing on routine tasks such as amenity upkeep, pressure washing, minor irrigation repairs, signage maintenance, painting, playground equipment

checks, and general cleaning. Larger or more specialized projects—such as pond maintenance, fire alarm servicing, major irrigation overhauls, electrical repairs, or tree trimming requiring aerial lifts—would be handled by qualified outside vendors. These vendors are selected based on their certifications, licenses, and proven track record in performing work that requires specific expertise or regulatory compliance. The ideal onsite personnel would bring experience in CDD or HOA maintenance environments, a strong understanding of community infrastructure, and skills in general repairs, landscaping basics, and amenity maintenance. The General Manager and Supervisor would also have leadership capabilities and vendor management experience, ensuring all work—both internal and contracted—is executed efficiently and to a high standard.

1. Please provide appropriate contact information for every community referenced in your answers.
  - a. Laureate Park- Denise Burgos: 407-705-2190 x172
  - b. Myrtle Creek Improvement District: Jennifer Walden, 407-723-5900
  - c. Lake Nona Golf and Country Club - Julie Childs: 407-816-6596



**8.G.****PRICING – FIELD MANAGEMENT AND MAINTENANCE SERVICES**

- Task 1.A. – Management with Proposer Employees
  - A. General Manager
    - Year 1 - \$ 109,650.00
    - Year 2 - \$ 115,132.50
    - Year 3 - \$ 120,889.13
    - Number of full-time managers or assistant managers 1
    - Number of part-time managers or assistant managers 0
- Task 1.B. – Management with District Employees (proposal alternate)
  - A. General Manager
    - Year 1 - \$ 109,650.00
    - Year 2 - \$ 115,132.50
    - Year 3 - \$ 120,889.13
    - Number of full-time managers or assistant managers 1
    - Number of part-time managers or assistant managers 0
- Task 1.C. – Management with Third-Party Employees (proposal alternate)
  - A. General Manager
    - Year 1 - \$ 109,650.00
    - Year 2 - \$ 115,132.50
    - Year 3 - \$ 120,889.13
    - Number of full-time managers or assistant managers 1
    - Number of part-time managers or assistant managers 0

If there would be an additional management charge if the District were to open and operate a RV storage lot, how much extra would it cost for management in Year 1, if any?

- \$ 72,446.40

- Task 2.A. – Maintenance Staffing
  - o Year 1 - \$ 221,384.48 + Required Lifeguard \_\_\_\_\_
  - o Year 2 - \$ 232,453.70 + Required Lifeguard \_\_\_\_\_
  - o Year 3 - \$ 244,076.38 + Required Lifeguard \_\_\_\_\_
  - o Number of full-time employees performing maintenance 3 + Required Lifeguard \_\_\_\_\_
  - o Number of part-time employees performing maintenance 1 + Required Lifeguard \_\_\_\_\_

If a subcontractor is proposed, please indicate:

- Amount to be Paid to Subcontractor for Year 1:

\$ 0

- Mark up retained by Proposer for Year 1:

\$ 0

- Task 2.B. – Maintenance Staffing with addition of leaf pick up services along community roadways when needed (proposal alternate)
  - o Year 1 - \$ 221,384.48 + Required Lifeguard \_\_\_\_\_
  - o Year 2 - \$ 232,453.70 + Required Lifeguard \_\_\_\_\_
  - o Year 3 - \$ 244,076.38 + Required Lifeguard \_\_\_\_\_
  - o Number of full-time employees performing maintenance 3 + Required Lifeguard \_\_\_\_\_
  - o Number of part-time employees performing maintenance 1 + Required Lifeguard \_\_\_\_\_

If a subcontractor is proposed, please indicate:

- Amount to be Paid to Subcontractor for Year 1:

\$ 0

- Mark up retained by Proposer for Year 1:

\$ 0



- Task 2.C. – Maintenance Staffing with addition of RV lot maintenance (proposal alternate)
  - o Year 1 - \$ 420,560.40
  - o Year 2 - \$ 441,588.42
  - o Year 3 - \$ 463,667.84
  - o Number of full-time employees performing maintenance 4 + Required Lifeguard
  - o Number of part-time employees performing maintenance 1 + Required Lifeguard

If a subcontractor is proposed, please indicate:

- Amount to be Paid to Subcontractor for Year 1:

\$ 0

- Mark up retained by Proposer for Year 1:

\$ 0

Currently, the District's field service company performs overall maintenance of all District ponds and conservation areas under the existing agreement. That includes: maintaining the required Florida Aquatics Pesticide/Herbicide Certification; providing a monthly pond report and Conservation Area report to the District Manager; keeping record of and updating all Safety Data Sheets (SDS) and Conservation Area treatment logs; ordering required chemicals; maintaining all equipment required for spraying ponds and Conservation Areas; safely storing all chemicals used on ponds and Conservation Areas; applying chemicals to ponds and Conservation Areas in accordance with applicable laws and District policy, as needed. If Proposer were to provide a maintenance employee to provide this service, how much extra would it cost for maintenance in Year 1, if any?

- o \$ We would subcontract it as we currently do not provide this service.

**8.H.**  
**ACKNOWLEDGEMENT**

Under penalties of perjury under the laws of the State of Florida, I declare that I have read the foregoing Proposal Forms and all of the questions are fully and completely answered, and all of the information provided is true and correct.

Dated this 29 day of JULY, 2025.

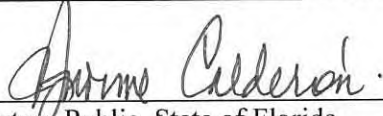
Proposer: Berman Construction LLC

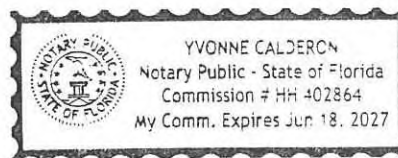
By: Samantha Sharenow 

Title: Executive Vice President

STATE OF FLORIDA  
COUNTY OF ORANGE

The foregoing instrument was acknowledged before me this 29 day of JULY, 2025, by Samantha Sharenow of Berman, who is personally known to me or who has produced \_\_\_\_\_ as identification, and did [ ] or did not [ ] take the oath.

  
\_\_\_\_\_  
Notary Public, State of Florida  
Print Name: YVONNE CALDERON  
Commission No.: HH 402864  
My Commission Expires: JUNE 18, 2027





## Other Items for Consideration

### Special Contract Provisions and Notes

- Local and State Applicable Sales Tax shall be applied to all applicable services.
- Berman is a State of Florida licensed General Contractor and can be utilized for full-service repairs on the property. For basic repair services beyond the site porter, we utilize our in-house Berman repair technicians who arrive uniformed and in a Berman vehicle at a billable rate of \$65.00 per hour. Materials are billed at cost plus 10 percent. Emergency repairs completed after hours at the Owner's request will be billed the hourly rate x 1.5 (\$97.50)
- For advanced repairs including Electrical, Mechanical, Plumbing and Other Vendors, Berman shall propose work to be performed with a cost breakout to the owner on a formal proposal. Should an emergency repair vendor be required, Berman can utilize our extensive vendor database if the capabilities are beyond our in-house repair personnel.
- During hurricanes and other natural disasters, our response time may be delayed, however, we will automatically respond after a Category 1 or higher storm in the area of the property. We will respond to the site as soon as feasibly and safely possible. The Owner will be notified by a Berman representative of any damage assessment once the site is fully inspected. Berman can internally handle all debris removal and damage restoration. We are stocked with (roof tarps, generators, water removal equipment, drying and dehumidification equipment. Our stock is kept ready for the hurricane season and is not used except for our base contract clients. This ensures we will not be waiting for equipment or unable to get equipment in the event of a storm incident.
- Startup expenses for this contract are absorbed by Berman (Berman will maintain ownership of all tools and equipment onsite that Berman purchases for daily services).
- Berman shall remain in compliance with the regulations of the Office of Foreign Assets Control (OFAC).
- Berman shall hold Client harmless and indemnify.
- Berman shall as a condition of this contract provide a valid certificate of insurance with the client and property ownership entity named as additional insured.
- All Berman site employees shall have uniforms and photo ID as approved by the client. Currently, the standard uniform is khaki pants or shorts with a Berman shirt.







# THANK YOU

Harmony CDD



COPY



Rizzetta & Company  
Professionals in Community Management



# PROPOSAL

Harmony Community Development District

Prepared for: Board of Supervisors

## REGIONAL OFFICE

8529 South Park Circle, Suite 330

Orlando, FL 32819

407.472.2471 | rizzetta.com

COPY

FIRSTLY

THANK YOU

FOR CONSIDERING US!





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## OUR STORY

### ... SO FAR

Rizzetta & Company is a Florida-based professional community management and consulting firm that provides services to residential and commercial communities throughout the state of Florida. With over 39 years in the industry, Rizzetta & Company, is staffed with highly experienced managers and support staff. Each of our offices throughout Florida has a team of employees with diverse backgrounds, both personally and professionally, who provide the highest quality services to our clients.

Rizzetta & Company was founded in 1986 in Tampa, Florida by William Rizzetta. The original focus of the Company was to provide professional assessment consulting services for Community Development Districts in association with the issuance of bonds. As the Company's reputation for excellent work and customer service grew, the practice expanded over the next thirty years by adding related services which resulted in today's "Full Service" organization.

## OFFICE LOCATIONS



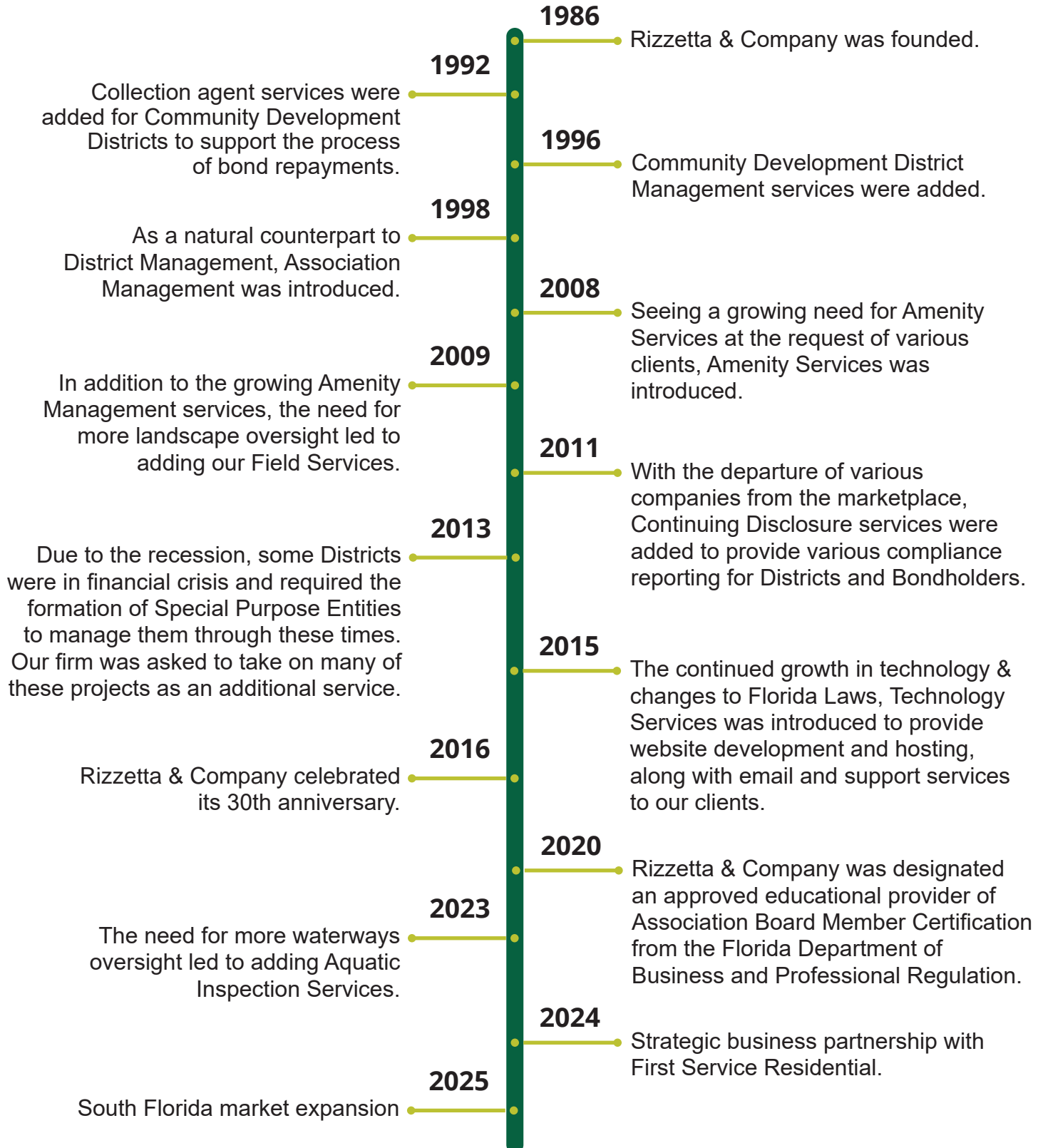
### HEADQUARTERS

3434 Colwell Avenue, Suite 200  
Tampa, FL 33614





# OUR MILESTONES





# BY THE NUMBERS

39 

YEARS OF  
EXPERIENCE  
EST. 1986

150+



ASSOCIATION  
SERVICES  
CLIENTS

55



ASSOCIATION  
SERVICES TEAM  
MEMBERS

20+



AMENITY  
SERVICES  
CLIENTS

100



AMENITY  
SERVICES TEAM  
MEMBERS

120+



DISTRICT  
SERVICES  
CLIENTS

50



DISTRICT  
SERVICES TEAM  
MEMBERS







COPY

OUR SERVICES

# COMMUNITY SERVICES

LIFE IS

BETTER

WHEN WE CREATE THE LIFESTYLE



## AMENITY SERVICES

Amenity Services provides professional onsite management services for amenity facilities in both Community Development Districts and Community Associations that can be customized to fit the needs of a community.

Amenity Services focuses on providing all the amenity staffing needs for a community through dedicated onsite staff designed to handle the day-to-day operational needs of any community so it may thrive at the highest level. A summary of these services is shown below:

- **Pre-Opening Services:** Pre-opening services consist of getting an amenity center ready, from concept to reality. Our dedicated group of professionals will handle everything needed to ensure a successful Grand Opening.
- **Onsite & Personnel Management:** Onsite management services include development of operating procedures and general community maintenance to maintain and improve efficiency. Personnel management services included the selection, supervision, evaluation, and ongoing training of staff.
- **Recreation Management:** Recreation management services provide management and oversight of all recreational assets including managing facility rental spaces.
- **Accountability & Communication:** Onsite staff will complete weekly or monthly reports regarding facility operations and accomplishments.
- **Community Newsletters:** Create informative community emails that are designed to promote activities and provide residents with important community updates.
- **Lifestyle & Events:** Plan and promote events to bring the community together to create memories by providing a variety of innovative programs, activities, and events for residents of all ages. Lifestyle activities for social, educational, instructional, wellness, and recreational programs can be customized for each community to maximize participation and enjoyment.
- **Owner Information:** Maintain detailed records to ensure up-to-date resident information for community amenity access purposes.
- **Maintenance Services:** Complete work orders, preventative maintenance procedures, and facility inspections to ensure all is in good working order. Provide client with proposals for various projects.
- **Facility Appearance:** Ensure all buildings, grounds, and amenities are kept in pristine condition to create a safe and welcoming environment for all residents.





## LANDSCAPE INSPECTION SERVICES

We offer an extensive menu of professional field services for both Community Development Districts and Community Associations. Our field services management team is Green Industries Best Management Practices (GIBMP) certified in the state of Florida. A summary of these services is shown below:

- **Landscape Maintenance Inspections:** Perform grounds inspections, provide the Client with inspection report, notify maintenance contractor about deficiencies in service and obtain proposals for various landscape projects.
- **Landscape Turnover Inspections:** Attend landscape turnover meeting and participate in the inspection on behalf of the Client. Follow up report provided.
- **Landscape and Irrigation Specification Development:** Develop a customized set of standards and specifications based on the Client's needs and budget. Conduct the bidding process, review and prepare a bid tabulation document for the Client. Assist the Client with reviewing the bid tabulation and other pertinent information.
- **Landscape Design:** Landscape designer on staff available for landscape design, landscape enhancements and landscape design consultation in the communities and amenity facilities.
- **Master Task Project Plan for Mature Communities:** Develop a project plan specific to landscape replacement and enhancement for the common grounds and the amenity facility. Emphasis is on maturing landscape in the community and budgeting accordingly.
- **Community Asset Management Plan:** Perform a complete inventory of the Client's assets and provide an inventory report.



## AQUATIC INSPECTION SERVICES

Our Aquatics Inspection division provides a layered testing and quality control systems, using the latest and most comprehensive industry standards. Each of our Aquatic Inspection Specialists is a certified Aquatic Weed Spray Technician in the state of Florida. Our team is committed to elevating the waterways in your community with detailed inspections, formal reporting, enhancement planning, and effective vendor communication strategies. A summary of these services is shown below:

- **Community Asset Management Plan:** Perform a complete inventory of the community aquatic assets and provide an inventory report to the board
- **Community Education:** Present teaching events to provide the latest research and developments in Aquatic Sciences and provide a knowledge base for the residents.
- **Aquatics Maintenance Inspections:** Perform visual waterway and body of water inspections, provide the board with an inspection report, notify maintenance contractor of deficiencies in service, and obtain proposals for aquatic projects.
- **Pond and Waterway Turnover Inspections:** Attend property turnover meetings that include waterways and participate in the inspection on behalf of the board. Provide a follow-up report regarding the turnover inspection.
- **Aquatics Specification Development:** Develop a request for proposal (RFP) document to include a customized set of standards and specifications based on the community needs and budget. Conduct the bidding process, review, and prepare a bid tabulation document for the board. Assist the board with reviewing the bid tabulation and other pertinent information.
- **Master Task Project Plan for Mature Communities:** Develop a project plan specific to long-term enhancements and maintenance for the community's waterways and bodies of water. Emphasis is on long-term health and efficiency of the waterflow systems in the community and efficient budgeting.





# WE BUILD MEMORABLE EXPERIENCES

Established in 2008, the Amenity Services division has quickly grown to over 150 full-time and part-time employees and is currently managing over twenty-five amenity facilities throughout Florida.

We provide a wide range of services for facilities in Community Development Districts and Community Associations that are cost-effective and can be customized to meet our client's needs. We are driven by creating experiences that deliver results for your community and exceed what residents expect.

Our Resort-Living Lifestyle concept is about creating memorable experiences by providing innovative programs, and events for residents of all ages. The recreational activities are carefully tailored to each community to maximize engagement and enjoyment.

## MISSION STATEMENT

*Others manage contracts, we manage relationships.*





# FIRST-CLASS SERVICE

The working partnership with our clients is at the heart of our success. Whether your community is small or large, our first-class service approach ensures every aspect of the day-to-day operational activities offer unparalleled service with outstanding results so it may thrive at the highest level.

## MANAGING RELATIONSHIPS

Rizzetta & Company Amenity Services focuses on relationship management, not just contracts. While working on behalf of our boards to implement and oversee policies, enhancements, and enforcement, we understand resident expectations and work to manage and exceed what residents expect.

## TRAINING AND CERTIFICATION

While we know we have the best trained managers in the business, we can prove it. All managers undergo a thorough two-week training process beginning in a regional office with a division manager. Dedicated training managers oversee the new leader's progression with multiple progress testing throughout advancement in multiple training stages. Once training has completed, a final certification test is administered by division leadership and must be passed before the candidate can be allowed to move into a Clubhouse Managers role.

## METRICS

While other companies may state they know what is happening property level, none can back that up. We can. Whether finances, property conditions, or division leadership presence on site, we measure everything and make it available to our boards.

## ACCOUNTABILITY

Beginning in 2022 we implemented a grueling 160-point based inspection to critique our managers' performance. This inspection sets the standards for our managers against which they are consistently critiqued. All aspects of their responsibilities are measured: conditions of facilities, fiscal management and file retention, human resource policies, procedures, and compliance, and even communication with their respective board members.





### DIVISIONAL LEADERSHIP SUPPORT

Our team of division leaders have one responsibility: support our managers. All communities are visited and inspected multiple times each month by one of our upper-level team leaders. This not only ensures we are consistently involved with our communities, but that our leaders have the support they need. These visits are tracked and benchmarked, with inspection documentation retained.

### ENGAGEMENT

While we know our managers are available for our board members, so is their leadership team. As a standard for division leadership, we are actively in communication with each board to ensure that we remain available to them. Each month, leadership engages different board members in our communities and invites them to meet for one-on-one discussions about their expectations and how our team is performing. You always have our attention.

### BACKED BY EXPERIENCE

Rizzetta & Company Amenity Services division leadership has over 50 years of combined customer service experience, with the majority of that in clubhouse management. Our division leadership team knows what it takes to be successful in a community. The division itself is supported by the Rizzetta name. Bill Rizzetta was part of the team that created Florida's first Community Development District. With over 35 years of experience, Rizzetta is the best in the business. From accounting to vendor management, Amenity Services manages all relationships knowing we have the best experience, knowledge, support, and expertise Rizzetta has to offer.





# SCOPE OF SERVICES

Rizzetta & Company, is providing a proposal for professional Amenity Management Services for the Harmony Community Development District (“District”). These services are listed by the following categories:

- Management
- Personnel
- Responsibilities
- Additional services
- Litigation support services

## **General Management & Oversight:**

- Provide the services of a Field Services Manager, Maintenance Tech, and Groundskeeper
- Manage all aspects of on-site staff: recruiting, hiring, training, oversight, and evaluation.
- Perform 160-point based inspection of General Manager performance.
- Work closely with the District Manager to remediate any complaints from the board.
- Provide prompt responses to the board of supervisors’ questions and concerns.

## **On-site Personnel:**

Each team member individually contributes to the success of Rizzetta & Company by applying their skills and talents in conjunction with our communities needs. Our team represents themselves and our company in a professional manner which is really what sets us apart from the others. We carefully screen and select each employee by performing a criminal background check, which scans local, county, state, and federal databases for their present and previous residences spanning the prior seven years. Sex offender, fraud, and abuse registries are then searched, and verifications are made that there are no current wants or warrants for the individual. Civil records are searched with prior employment rigorously verified. Lastly, all Rizzetta & Company personnel must pass a 5-panel drug screening before being offered a position with our Company.





# HARMONY CDD PERSONNEL PROFILE

While we believe the below staffing proposal allows for the highest rate of success for the community, all staffing and wages are for proposal purposes only. Each are amenable by board before final contract.

## Field Services Manager

The company will provide the service of a Field Services Manager that will be on the property for a minimum of 40 hours per week and will perform the following duties:

- Responsible for day-to-day maintenance operations, adhering to District budget, and assist the District Manager in managing vendor contracts relating to the amenity and community assets, development of standard operation policies and procedures.
- Ensure all building facilities adhere to proper safety standards and cleaning procedures, but not limited to:
  - » General Maintenance: Replace light bulbs, control cobwebs around the amenity center and touch up paint interior and exterior.
  - » Amenity Areas: Empty waste receptacles and pick up debris
  - » Swimming Pool Deck: Blow off pool decks, arrange furniture, empty, and clean all receptacles, and adjust umbrellas.
  - » Main Entrance & Parking Lot: Pick up litter, blow off debris.
  - » Perform minor repairs to the entrance/exit gates, equipment and facilities as needed.
  - » Clean and sanitize clubhouse and amenities, as needed.
- Responsible for the performance management of maintenance technician team
- Assesses condition of District property resulting from neglect, vandalism, depreciation and estimates the costs associated with its repair and/or replacement.
- Work with assigned contractors to ensure quality service is provided to the community.
- Inspect District common areas and report any problems to the District Manager.
- Prepare any incident or accident reports and forward to the District Manager.
- Display flexibility in handling after-hours emergency calls.
- Direct purchasing, receiving, storage, issuing and control of maintenance products, supplies, and equipment.
- Process and manage work orders and update the District Manager with project status and completion.
- Check and assess street signs, monuments, and informational signs. Report any issues to the District Manager.
- Check conditions of roads, sidewalks, and curbs. Report any issues to the District Manager.



## Maintenance Tech

The company will provide the service of a Maintenance Tech that will be on property a minimum of 40 hours per week and will perform the following duties:

- Assist the Field Services Manager in managing vendor contracts relating to amenity and community assets, as well as assisting in the development of standard operation policies and procedures.
- Provide first-class customer service to the residents and guests to maintain a safe and comfortable environment.
- Work with assigned contractors to ensure quality service is provided to the community.
- Inspect District common areas and report any problems to the Field Services Manager.
- Prepare any incident or accident reports and forward to the Field Services Manager.
- Ensure all building facilities adhere to proper safety standards and cleaning procedures, but not limited to:
  - » General Maintenance: Replace light bulbs, control cobwebs around the clubhouse and touch up paint interior and exterior.
  - » Amenity Areas: Empty waste receptacles and pick up debris
  - » Swimming Pool: Blow off pool decks, arrange furniture, empty, and clean all receptacles, and adjust umbrellas.
  - » Main Entrance & Parking Lot: Pick up litter, blow off debris.
  - » Playground: Check equipment, empty receptacles and pick up debris.
  - » Perform minor repairs to the entrance/exit gates, equipment and facilities as needed.
  - » Clean and sanitize clubhouse and amenities, as needed.
- Check the conditions of roads, sidewalks, and curbs. Report any issues to Field Service Manager.
- Check and assess street signs, monuments, and informational signs. Report any issues to the Field Services Manager.
- Process and manage work orders and update the Field Services Manager with project status and completion.
- Direct purchasing, receiving, storage, issuing and control of maintenance products, supplies, and equipment.
- Any other duties assigned by the Field Services Manager.
- Ensure an immaculate overall appearance of the amenities.





## Groundskeeper

The company will provide the service of Groundskeeper that will be on property for a minimum of 40 hours per week and will perform the following duties:

- Responsible for day-to-day grounds and housekeeping maintenance operations, adhering to District budget, and assisting in managing vendor contracts relating to the amenity and community assets, as well as assisting in the development of standard operation policies and procedures.
- Provide first-class customer service to the residents and guests to maintain a safe and comfortable environment.
- Work with assigned contractors to ensure quality service is provided to the community.
- Inspect District common areas and report any problems to the Field Services Manager.
- Prepare any incident or accident reports and forward to the Field Services Manager.
- Ensure all building facilities adhere to proper safety standards and cleaning procedures, but not limited to:
  - » General Maintenance: Replace light bulbs, control cobwebs around the amenity center and touch up paint interior and exterior.
  - » Amenity Areas: Empty waste receptacles and pick up debris
  - » Swimming Pool: Blow off pool decks, arrange furniture, empty, and clean all receptacles, and adjust umbrellas.
  - » Main Entrance & Parking Lot: Pick up litter, blow off debris.
  - » Playground: Check equipment, empty receptacles and pick up debris.
  - » Perform minor repairs to the entrance/exit gates, equipment and facilities as needed
  - » Clean and sanitize clubhouse and amenities, as needed.
- Check the conditions of roads, sidewalks, and curbs. Report any issues to Field Service Manager.
- Check and assess street signs, monuments, and informational signs. Report any issues to the Field Services Manager.
- Process and manage work orders and update the Field Services Manager with project status and completion.
- Direct purchasing, receiving, storage, issuing and control of maintenance products, supplies, and equipment.
- Any other duties assigned by the Field Services Manager.
- Ensure an immaculate overall appearance of the amenities.



## General Duties for All Staff Members:

- Familiarity with District Rules, Regulations, Policies, Operating Procedures
  - » Full knowledge/awareness of all rules, regulations, or policies of the District.
  - » Prepare any incident or accident reports and forward to the District Manager.
- Enforce the rules, regulations, and policies of the Association.
  - » The Contractor's staff have the authority to have Patrons and others removed from the property when such persons become belligerent, unruly, or in some other way refuse to follow the rules and regulations. Such incidences will be reported promptly to the District.
- Community Relations.
  - » Meet and greet residents and guests.
  - » Handle interactions professionally and forward any questions, concerns, and requests to the District Manager prior to making commitments.
  - » Provide the best possible customer service to maintain a safe and comfortable environment.







# PROPOSED PRICING

## Description of Services Provided

### Amenity Management Services

Services will be billed bi-weekly, payable in advance of each bi-week pursuant to a one-year contact.

#### PERSONNEL

<b>Field Services Manager</b>	(1) Full-Time Personnel - 40 hours/week
<b>Maintenance Techs</b>	(2) Full-Time Personnel - 40 hours/week
	(1) Part-Time Personnel - 30 hours/week
<b>Groundskeeper</b>	(1) Full-Time Personnel - 40 hours/week

Budgeted On-site Personnel	\$377,082.22
General Management and Oversight <sup>(1)</sup>	\$ 12,000.00
	<hr/>
Year-1 Total Fee	<b>\$389,082.22</b>
Year-2 Total Fee	<b>\$391,521.94</b>
Year-3 Total Fee	<b>\$410,181.61</b>

(1). General Management and Oversight: The costs associated with Amenity Services expertise and time in the implementation of the day-to-day scope of services, management oversight, hiring, and training of staff.

The District shall be responsible for any of the following costs associated with the operation of the amenity facilities: *Pre-employment Testing:* Background and substance abuse reports shall be ordered for candidates identified to fill amenity positions. *Uniforms:* Personnel shall wear community specific shirts provided by the Association if required. *Cell Phone:* Management personnel shall require a cell phone or a cell phone allowance. This phone will also be used as the contact number for the Association for after hour emergencies. *Office Equipment:* Personnel will require a dedicated computer, printer, and a digital camera as well as convenient access to an onsite copier and fax machine, provided by the Association. *Mileage Reimbursement:* Personnel shall receive mileage reimbursement incurred while performing the Association's responsibilities when using a personal vehicle. Mileage shall be reimbursed at the rate approved by the Internal Revenue Service.



## IMMEDIATE SUPPORT FOR HARMONY TEAM MEMBERS

Rizzetta & Company prides itself on the experience and dedication of its collective staff. When you engage Rizzetta, you have a combined group with hundreds of years of experience at your service.



**Chico  
Rivera**

Chico Rivera is the Amenities Manager at Rizzetta & Company, bringing over 16 years of experience in hospitality management and conservation science.

His strategic approach and leadership skills have been instrumental in achieving significant milestones throughout his career, earning multiple IHG Excellence in Quality awards as General Manager of IHG-Holiday Inn Express Lakeland South, and serving as a Regional Operations & Revenue Manager. His leadership extended beyond the workplace as he served as a Board Member and Vice President of the Lakeland Hospitality Alliance, advocating for the local hospitality industry.

In addition to his extensive hospitality experience, Mr. Rivera has also made notable contributions as a conservation scientist, focusing on the preservation of endangered plant species. As a Rare Plant Specialist at Bok Tower Gardens, he managed Florida's rare plant species and led conservation initiatives, demonstrating his commitment to preserving biodiversity. This unique blend of hospitality and scientific expertise underscores his commitment to community, sustainability, and innovation.

He holds a B.S. in Geology from the University of Florida and is pursuing an M.S. in Forest Resources and Conservation. His community-driven passion is evident in his volunteer roles, including as a Weekend Wayfinder at Se7en Wetlands and a Coral Nursery Assistant at The Florida Aquarium.



**Gregg  
Gruhl**

Gregg Gruhl is the administrative support manager for community services, where he assists the managers of amenities and landscape inspection services. Before taking on his current role, Gregg worked in several positions, including corporate recruiter, amenity services manager, and on-site clubhouse manager.

Before joining Rizzetta & Company, Mr. Gruhl served as the Region 3 Tennis Program Coordinator for USTA Florida, was the Chief Operating Officer and founding partner of GL Sports Entertainment, and served 22 years as the Director of Tennis at Northdale Golf and Tennis Club. Mr. Gruhl received his Bachelor of Arts from the University of South Florida.





## EXTENDED SUPPORT FOR HARMONY CDD TEAM MEMBERS



**Luciano  
Mastrionni**

Luciano Mastrionni is Rizzetta & Company's Vice President of Corporate Services. Luciano oversees and supports the company's strategic planning processes, development, operations leadership, talent expansion and retention, oversight, and growth. Luciano also oversees the leadership team of the Community Services Division, comprised of the Amenity Services and Landscaping Inspection Services Divisions and Aquatics Services. Additionally, he oversees Rizzetta's Business Development, Marketing, Information Technology, and Human Resources Management teams. In these capacities, Luciano oversees functions, focusing on planning, development, and delivery of all programs, and services.

Before joining our team, Luciano served in hotel general management and asset management for hotel ownership companies including Hilton, Marriott, and IHG hotels, and worked in guest service operations management for The Walt Disney Company for over a decade. Most recently Luciano served in corporate Hotel Management, overseeing new hotel builds, and Task Force General Management oversight, recovering distressed properties for an array of major hotel ownership companies across the United States. Luciano holds his Bachelor of Science in Aeronautics from Embry Riddle Aeronautical University and maintains his Commercial Pilots License with numerous ratings and certifications.



**Taylor  
Nielsen**

Taylor Nielsen is our Manager of Business Development for Rizzetta & Company and is responsible for development and execution of strategic initiatives aimed at growth and expansion. Prior to this role, Taylor served as a District Manager for accounts in the Hillsborough, Manatee and Pasco Counties.

Before joining the team at Rizzetta & Company, Taylor came from a background of Operations and Brand Management; with over 7 years of experience. During this time, Taylor was working in the tourism hotspot, Orlando, FL among top level management overseeing the largest rental car operation in the world, generating over 100 million in revenues per year.

Taylor received his B.A. from the University of Central Florida, is a licensed Community Association Manager, and licensed Real Estate Sales Associate in Florida.



# LIFESTYLE & SOCIAL EVENT CALENDAR

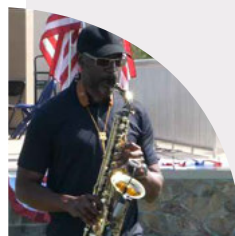
## Health & Wellness

- Healthy Eating Workshop
- Group Fitness Class
- Yoga at Sunrise
- Full Body Workout
- Bootcamp Training
- Run Club Meet Up



## Music & Arts

- Live Music Entertainment
- Move Your Body Dance Camp
- Exploring Colors Art Class
- Paint & Sip Events



- Love is in the Air Bash
- Easter Egg Hunt
- Red, White & BBQ
- Annual Fall Fest
- Halloween Spooktakular Carnival
- Holiday Celebration

## Holiday Activities



- Food Truck Rally
- Trivia Night
- Bingo Fever
- Movies on the Lawn
- Themed Social Mixers

## Monthly Events





# LIFESTYLE & SOCIAL COMMUNITY EXPERIENCE



**KIDS VALENTINE'S BASH**



**PAINT & SIP**



**PUMPING PAINTING & MOVIES**



**CAMP OUT EVENT**



**DOWNTON ABBEY MIXER**



**HOLIDAY CELEBRATION**



**LIVE FROM LAS VEGAS**



**RED, WHITE & BBQ**



## OUR COMMITMENT TO THE INDUSTRY

As a leader in District Management, we have a responsibility to be aware of industry-related developments and then sharing that knowledge with our clients and peers. We encourage continuing education for all staff and provide the resources needed to attend classes and conferences. Currently, Rizzetta holds memberships in the following professional organizations:

- Association of Florida Community Developers
- Community Associations Institute
- International Society of Arboriculture
- The Northeast Florida Builders Association
- The Greater Tampa Chamber of Commerce
- Florida Government Finance Officers Association
- Florida Nursery, Growers & Landscape Association
- CFO Exchange Group
- Florida Association of Special District
- Leadership Tampa Bay
- Tampa Bay Builders Association
- Urban Land Institute, Tampa Bay
- Visit Tampa Bay

## GIVING BACK TO THE COMMUNITY



Rizzetta believes we have a responsibility to give back to the communities in which we operate. We have found the personal rewards of helping far exceeds any investments made.





**BID**

**FORMS**



8. PROPOSAL FORMS

8.A.

AFFIDAVIT OF ACKNOWLEDGMENTS

STATE OF FLORIDA  
COUNTY OF Hillsborough

Before me, the undersigned authority, appeared the affiant, William J. Rizzetta and having taken an oath, affiant, based on personal knowledge, deposes and states:

1. I am over eighteen (18) years of age and competent to testify as to the matters contained herein. I serve in the capacity of President for Rizzetta & Company ("Proposer"), and am authorized to make this Affidavit of Acknowledgments on behalf of Proposer.

2. I assisted with the preparation of, and have reviewed, the Proposer's proposal ("Proposal") provided in response to the Harmony Community Development District Request for Proposals for Field Management and Maintenance Services. All of the information provided therein is full and complete, and truthful and accurate. I understand that intentional inclusion of false, deceptive or fraudulent statements, or the intentional failure to include full and complete answers, may constitute fraud; and, that the District may consider such action on the part of the Proposer to constitute good cause for rejection of the proposal.

3. I do hereby certify that the Proposer has not, either directly or indirectly, participated in collusion or proposal rigging.

4. The Proposer agrees through submission of the Proposal to honor all pricing information ninety (90) days from the opening of the proposals.

5. The Proposer acknowledges the receipt of the complete Request for Proposals as provided by the District and as described in the Table of Contents, as well as the receipt of the following Addendum Numbers: 1.

6. The Proposer authorizes and requests any person, firm or corporation to furnish any pertinent information requested by the Harmony Community Development District, or its authorized agents, deemed necessary to verify the statements made in the Proposal, or regarding the ability, standing, integrity, quality of performance, efficiency, and general reputation of the Proposer.

*[Signature page to follow]*



Under penalties of perjury under the laws of the State of Florida, I declare that I have read the foregoing Affidavit of Acknowledgments and that the foregoing is true and correct.

Dated this 24 day of July, 2025.

Proposer: William J. Rizzetta

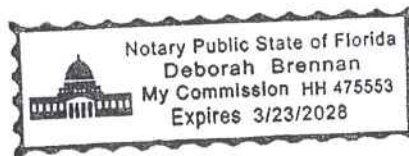
By: William J. Rizzetta

Title: President

STATE OF FLORIDA  
COUNTY OF Hillsborough

The foregoing instrument was acknowledged before me this 24 day of July, 2025, by William J. Rizzetta of Rizzetta & Co., who is personally known to me or who has produced known to me as identification, and did [ ] or did not [ ] take the oath.

Deborah Brennan  
Notary Public, State of Florida  
Print Name: Deborah Brennan  
Commission No.: HH 475553  
My Commission Expires: 3-23-2028



**8.B.**

**SWORN STATEMENT UNDER SECTION 287.133(3)(a),  
FLORIDA STATUTES, REGARDING PUBLIC ENTITY CRIMES**

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

1. This sworn statement is submitted to Harmony Community Development District.
2. I am over eighteen (18) years of age and competent to testify as to the matters contained herein. I serve in the capacity of President for Rizzetta & Company ("Proposer") and am authorized to make this Sworn Statement on behalf of Proposer.
3. Proposer's business address is 3434 Colwell Ave ste. 200 Tampa, FL 33614  
\_\_\_\_\_  
\_\_\_\_\_
4. Proposer's Federal Employer Identification Number (FEIN) is 59-3075187  
\_\_\_\_\_  

(If the Proposer has no FEIN, include the Social Security Number of the individual signing this sworn statement: \_\_\_\_\_.)
5. I understand that a "public entity crime" as defined in Paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
6. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.



7. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), Florida Statutes, means:

- a. A predecessor or successor of a person convicted of a public entity crime; or,
- b. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

8. I understand that a "person" as defined in Paragraph 287.133(1)(e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

9. Based on information and belief, the statement which I have marked below is true in relation to the Proposer submitting this sworn statement. (Please indicate which statement applies.)

→ 109 Neither the entity submitting this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, nor any affiliate of the entity, have been charged with and convicted of a public entity crime subsequent to July 1, 1989.

\_\_\_ The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members or agents who are active in management of the entity or an affiliate of the entity, has been charged with and convicted of a public entity crime subsequent to July 1, 1989, AND (please indicate which additional statement applies):

\_\_\_ There has been a proceeding concerning the conviction before an Administrative Law Judge of the State of Florida, Division of Administrative Hearings. The final order entered by the Administrative

Law Judge did not place the person or affiliate on the convicted vendor list.  
(Please attach a copy of the final order.)

\_\_\_ The person or affiliate was placed on the convicted vendor list. There has been a subsequent proceeding before an Administrative Law Judge of the State of Florida, Division of Administrative Hearings. The final order entered by the Administrative Law Judge determined that it was in the public interest to remove the person or affiliate from the convicted vendor list. (Please attach a copy of the final order.)

\_\_\_ The person or affiliate has not been placed on the convicted vendor list. (Please describe any action taken by or pending with the Florida Department of Management Services.)

Under penalties of perjury under the laws of the State of Florida, I declare that I have read the foregoing Sworn Statement under Section 287.133(3)(a), Florida Statutes, Regarding Public Entity Crimes and all of the information provided is true and correct.

Dated this 24 day of July, 2025.

Proposer: William J. Rizzetta

By: William J. Rizzetta

Title: President

STATE OF Florida  
COUNTY OF Hillsborough

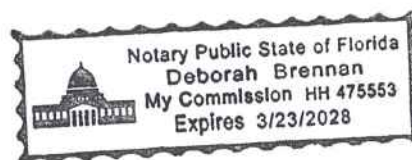
The foregoing instrument was acknowledged before me this 24 day of July, 2025, by William J. Rizzetta of Rizzetta & Co., who is personally known to me or who has produced Known to me as identification, and did [ ] or did not [ ] take the oath.

Deborah Brennan  
Notary Public, State of Florida

Print Name: Deborah Brennan

Commission No.: NH 475553

My Commission Expires: 3-23-2028





## 8.C. GENERAL PROPOSER INFORMATION

- Proposer General Information:*

Proposer Name Rizzetta & Company

Street Address 8259 Southpark Circle Suite 330

P. O. Box (if any) \_\_\_\_\_

City Orlando State Florida Zip Code 32819

Telephone 813-658-6048 Fax no. \_\_\_\_\_

1st Contact Name Taylor Nielsen Title Business Dev Manager

2nd Contact Name Lucianno Mastrionni Title Vice President

Parent Company Name (if any) n/a

Street Address \_\_\_\_\_

P. O. Box (if any) \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Telephone \_\_\_\_\_ Fax no. \_\_\_\_\_

1st Contact Name \_\_\_\_\_ Title \_\_\_\_\_

2nd Contact Name \_\_\_\_\_ Title \_\_\_\_\_

- Company Standing:*

Proposer's Corporate Form: Corporation  
(e.g., individual, corporation, partnership, limited liability company, etc.)

In what State was the Proposer organized? Florida Date 1986

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

If no, please explain \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Is the Proposer registered with the State of Florida, Division of Corporations and authorized to do business in Florida? Yes X No \_\_\_\_

If no, please explain \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

- *What are the Proposer's current insurance limits?*

General Liability	\$ 1,000,000
Automobile Liability	\$ 1,000,000
Workers Compensation	\$ 1,000,000
Expiration Date	5/1/26

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

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



**8.D.**  
**PERSONNEL**

- *List the location of the Proposer's office, which would perform work for the District.*

Street Address 8259 Southpark Circle Suite 330

P. O. Box (if any) \_\_\_\_\_

City Orlando State Florida Zip Code 32819

Telephone 813-658-6048 Fax no. \_\_\_\_\_

1st Contact Name Taylor Nielsen Title Business Dev Manager

2nd Contact Name Lucianno Mastrionni Title Vice President

- *Officers and Supervisory Personnel – Please complete the pages that follow at the end of this Part regarding the Proposer's Officers and Supervisory Personnel, and attach resumes for any Supervisory Personnel listed.*
- *Subcontractors – Does the Proposer intend to use any subcontractors in connection with the work? Yes \_\_\_ No X For each subcontractor, please provide the following information (attach additional sheets if necessary):*

Subcontractor Name n/a

Street Address \_\_\_\_\_

P. O. Box (if any) \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Telephone \_\_\_\_\_ Fax no. \_\_\_\_\_

1st Contact Name \_\_\_\_\_ Title \_\_\_\_\_

2nd Contact Name \_\_\_\_\_ Title \_\_\_\_\_

Proposed Duties / Responsibilities: \_\_\_\_\_

Please describe the subcontractor's role in other projects on behalf of the Proposer:

Project Name/Location: \_\_\_\_\_

Contact: \_\_\_\_\_ Contact Phone: \_\_\_\_\_

Project Type/Description: \_\_\_\_\_

Dollar Amount of Contract: \_\_\_\_\_

Proposer's Scope of Services for Project: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Dates Serviced: \_\_\_\_\_

- *Security Measures - Please describe any background checks or other security measures that were taken with respect to the hiring and retention of the Proposer's personnel who will be involved with this project, and provide proof thereof to the extent permitted by law:*

\_\_\_\_\_

Employees receive a background check and drug screen prior to employment.

\_\_\_\_\_



## OFFICERS

PROPOSER: Rizzetta & Company

DATE: 7/3/2025

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

NAME	POSITION OR TITLE	RESPONSIBILITIES	INDIVIDUAL'S RESIDENCE CITY, STATE
William J. Rizzetta	President	President	Tampa, FL
FOR PARENT COMPANY (if applicable)			
n/a			

**SUPERVISORY PERSONNEL  
WHO WILL BE INVOLVED WITH THE WORK  
\*\*NOTE: ATTACH RESUMES OF INDIVIDUALS LISTED BELOW\*\***

PROPOSER: Rizzetta & Company

DATE: 7/3/2025

INDIVIDUAL'S NAME	PRESENT TITLE	JOB RESPONSIBILITIES	OFFICE LOCATION	% OF TIME TO BE DEDICATED TO THIS PROJECT	YEARS OF EXPERIENCE IN PRESENT POSITION	TOTAL YEARS OF RELATED EXPERIENCE
Lucianno Mastrionni	Vice President	Corporate Services	Tampa, FL	as needed	3	20+
Scott Brizendine	Vice President	CDD Operations	Tampa, FL	as needed	20+	20+



**8.E.**  
**EXPERIENCE**

- *Has the Proposer performed work for a community development district or master planned residential community in excess of 500 acres previously? Yes ☒ No ☐ If yes, please provide the following information for each project (attach additional sheets if necessary; if there are more than five districts or communities that are responsive, please provide the information requested for the five most similar to the Harmony CDD):*

Project Name/Location: Triple Creek CDD

Contact: Marc Carlton Contact Phone: boardmember1@triplecreekcdd.com

Project Type/Description: 2300+ Single Family Units and 3 Amenity Centers

Dollar Amount of Contract: In excess of \$600k

Scope of Services for Project: District Management and Amenity Management

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Dates Serviced: \_\_\_\_\_

- *List the Proposer's total annual dollar value of district management completed for each of the last two (2) years starting with the latest year and ending with the most current year:*

2024 = \_\_\_\_\_

2023 = \_\_\_\_\_

- *Please provide the following information for each project that is similar to this project, and that you are currently undertaking, or have undertaken, in the past five years. (attach additional sheets if necessary; if there are more than five projects that are responsive, please provide the information requested for the five most similar to the Harmony CDD):*

Project Name/Location: see attached sheet

Contact: \_\_\_\_\_ Contact Phone: \_\_\_\_\_

Project Type/Description: \_\_\_\_\_

Dollar Amount of Contract: \_\_\_\_\_

Your Company's Scope of Services for Project: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**Attached Sheet:**

- *Please provide the following information for each project that is similar to this project, and that you are currently undertaking, or have undertaken, in the past five years. (attach additional sheets if necessary; if there are more than five projects that are responsive, please provide the information requested for the five most similar to the Harmony CDD):*

1. Solterra Resort CDD  
Polk County  
District Management  
Awarded to Rizzetta & Company in July 2025  
Chairman Brian Meert – [seat3@solterraresortcdd.com](mailto:seat3@solterraresortcdd.com)
2. Cypress Creek CDD  
Hillsborough County  
District Management and Amenity Management  
Awarded to Rizzetta & Company in June 2025  
Chairman Jason Hepburn – [seat2@cypresscreekcdd.com](mailto:seat2@cypresscreekcdd.com)
3. Lake St. Charles CDD  
Hillsborough County  
District Management and Amenity Management  
Awarded to Rizzetta & Company in June 2025  
Chairman Ginny Gianakos – [ggianakos@lakestcharles.org](mailto:ggianakos@lakestcharles.org)
4. Villasol CDD  
Osceola County  
District Management  
Awarded to Rizzetta & Company in March 2025  
Chairman Herman Perez – [hperez@villasol.org](mailto:hperez@villasol.org)
5. Acacia Fields CDD  
Pasco County  
District Management  
Awarded to Rizzetta & Company in June 2025  
Chairman Kelly Evans – [Kelly.evans@lennar.com](mailto:Kelly.evans@lennar.com)

- *Has the Proposer, or any of its principals or supervisory personnel (e.g., owner, officer, or supervisor, etc.), been terminated from any district management contract within the past 3 years? Yes X No \_\_\_\_\_ For each such termination, please provide the following information (attach additional sheets as needed):*

Project Name/Location: see attached sheet

Contact: \_\_\_\_\_ Contact Phone: \_\_\_\_\_

Project Type/Description: \_\_\_\_\_

Dollar Amount of Contract: \_\_\_\_\_

Scope of Services for Project: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Dates Serviced: \_\_\_\_\_

Reason for Termination: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



**Attached Sheet:**

- *Has the Proposer, or any of its principals or supervisory personnel (e.g., owner, officer, or supervisor, etc.), been terminated from any district management and/or facility maintenance management contract within the past three (3) years? Yes X No \_\_\_\_ For each such incident, please provide the following information and attach additional sheets if necessary:*

**2025 terminations:**

None

**2024 terminations:**

1. Concord Station CDD - District Management Services: Board transitioned to new residents who elected to move several contracts from those whom the developer employed, including management.
2. Eagle Pointe CDD - District Management Services: Board transitioned from developer to residents. The residents elected to move several contracts from those whom the developer employed, including management.
3. Summer Woods CDD - Amenity Management Services: Board terminated our amenity contract; we only provided them one part-time employee at 15 hours/week, who was found no longer to be necessary.
4. Riverwood Estates CDD - District Management Services: Board transitioned to builder from developer, builder moved the account to their preferred management partner.
5. Palmetto Ridge CDD - District Management Services: Board transitioned to builder from developer, builder moved the account to their preferred management partner.
6. Southpointe of Manatee County CDD - District Management Services: Board transitioned to builder from developer, builder moved the account to their preferred management partner.
7. Bridgewater CDD - District Management Services: Board terminated because they felt there were too many assigned District Manager transitions.
8. Nature Walk CDD – Amenity Management Services: Board eliminated the maintenance position we were providing.

**2023 terminations:**

1. Heritage Harbor South CDD - District Management Services: A competitor company recruited our District Manager assigned to this account, and the client moved to that competitor upon our employee moving there.
2. Highlands CDD - District Management Services: A competitor company recruited our District Manager assigned to this account, and the client moved to that competitor upon our employee moving there.
3. Mira Lago West CDD - District Management Services: A competitor company recruited our District Manager assigned to this account, and the client moved to that competitor upon our employee moving there.
4. Diamond Hill CDD - District Management Services: This client left in 2023, and is currently requesting a proposal from us to provide services again.

- *Please state whether or not the Proposer or any of its affiliates are presently barred or suspended from bidding or contracting on any state, local, or federal contracts?      Yes  
\_\_\_\_ No X      If yes, please provide:*

The names of the entities \_\_\_\_\_  
\_\_\_\_\_

The state(s) where barred or suspended \_\_\_\_\_  
\_\_\_\_\_

The period(s) of debarment or suspension \_\_\_\_\_  
\_\_\_\_\_

Also, please explain the basis for any bar or suspension:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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

none  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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



We have been named secondarily as manager of clients, but not primarily in the last five years.

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## 8.F.

### SUPPLEMENTAL QUESTIONS

#### **1. Referencing a specific community(s), what Best Practices are now being implemented due to the suggestion of your company?**

- a. Referencing Triple Creek CDD, we have implemented weekly reporting that include project updates, completions, and upcoming initiatives. These are also implemented in most of our other communities, and allow our teams to establish confidence from our Boards through communication and transparency. Communications are also extended to residents through newsletters and email blasts, encouraging engagement.

Samples:

#### **FIELD MAINTENANCE**

Previous attachment

- Continuing to monitor community for vehicles that need towing by Target RT Towing.
- Vendor still working on trapping wild hogs – new damage was reported due to hogs.
- Continuing to monitor Colonnade Vista for repeat dumping offenders.
- Track lighting completed at lake House and Tripoli.
- New Mag-lock on sports court gate slowly loosened from gate frame and fell over (I went through footage was able to see when the lock became loose and fell. Damage not due to vandalism). Fixed gate inhouse.
- Awaiting new proposal for basketball gate. Complete IT reaching out to their preferred fencing vendor.
- Continuing to monitor areas needing pressure washing daily. Planning quarterly power washing cleaning for shaded areas, and mildew cleaners / bleach solutions to be used when possible.
- Reporting additional fallen trees, irrigation leaks and other landscaping issues to DM and LMP. Ongoing.

CATEGORY	ACTIVITY	DESCRIPTION
Interior	Attic	Examine for evidence of any leaks. Check insulation and remove or add if necessary. Check for evidence of birds, squirrels, raccoons, etc. Check for proper ventilation.
Plumbing	Water heater	Flush out hot water to remove accumulated sediment.
Electrical and Appliances	Heating and cooling system	General furnace inspection: Look for rust, scaling on heat exchanger, and proper flame color; note odd sounds or smells; and check condition of venting. Remove debris around units.
Interior	Shower doors/tub enclosures	Inspect for proper fit. Adjust if necessary. Inspect caulking and recaulk if necessary.
Exterior	Decks	Scrub mildewed areas and treat for water stains, mildew, and fungus.

## 2. Referencing a specific community(s), how have you suggested the Board address the ongoing maintenance and replacement of community assets?

- a. Referencing Summerport, implementation of inventory management and maintenance schedules has been a successful tool for asset management. This ensures timely replacements, reduces unexpected downtime, and assists with long term planning and decision making.

### Samples:

Description	ID/Serial number	New/Used	Date purchased	Manufacturer	Model	Model year	Capacity	Amount of insurance
MOWER - Toro Z-Master 60	12SL181640028							11000
MOWER - Toro Z-Master 60	12SL181710058							11000
Utility/Groundskeeping Vehicle - Kubota	C3648							10600
Utility/Groundskeeping Vehicle - Kubota	C4188							10600
100 gallon sprayer w/ rig	35858							3500
100 gallon sprayer w/ rig	35854							3500
STIHL FC 91 Edger	521585526							380
STIHL FC 91 Edger	531853204							380
STIHL FC 91 Edger	521585300							380
STIHL FC 91 Edger	531852929							380
STIHL FC 91 Edger	522740725							380
STIHL FC 91 Edger	519508874							380
STIHL FS 91R String Trimmer	532362191							350
STIHL FS 91R String Trimmer	521801180							350
STIHL FS 91R String Trimmer	532362007							350
STIHL FS 91R String Trimmer	532362010							350
STIHL FS 91R String Trimmer	521801166							350
STIHL FS 91R String Trimmer	521801168							350
STIHL FS 91R String Trimmer	512024632							350
STIHL FS 91R String Trimmer	524053290							350
STIHL HL 94K Hedge Trimmer	532717084							510
STIHL HL 94K Hedge Trimmer	532717083							510
STIHL HL 94K Hedge Trimmer	532717100							510
STIHL HL 94K Hedge Trimmer	532717086							510
STIHL HL 94K Hedge Trimmer	532658714							510
STIHL HL 94K Hedge Trimmer	532717082							510
STIHL HL 94K Hedge Trimmer	532717094							510
STIHL BR600 Backpack Blower	523684194							500
STIHL BR600 Backpack Blower	523684194							500



**3. How many onsite personnel would you suggest being utilized at Harmony for management and for field maintenance activities not already being performed by outside vendors?**

- a. A Field Manager, 3 Maintenance Technicians, and a Groundskeeper.

**-What types of projects would be handled by such personnel and which project would be handled by outside vendors?**

-Budget management, project trackers, vendor and contract management, repairs, and groundskeeping. Outside vendors may be used conservatively in specialized projects as necessary.

**- What skill sets and prior experiences would you seek in personnel to achieve the staffing support described in the prior question?**

-This depends on the job, but they are tailored to include relevant experience and skillsets aligning with each. We have a dedicated Talent Acquisition team that will aid in this process, and we can also take into consideration specifics that the Board may want included in their criteria for hiring.

**- For each such individual, what would be the weekly number of hours devoted to the Harmony CDD?**

-All hours for each employee proposed are solely dedicated to Harmony.

**4. Please provide appropriate contact information for every community referenced in your answers.**

Triple Creek – Marc Carlton – [boardmember1@triplecreekcdd.com](mailto:boardmember1@triplecreekcdd.com)

Summerport – Brent Reynolds - [brent.reynolds@fsresidential.com](mailto:brent.reynolds@fsresidential.com)

**8.G.**

**PRICING – FIELD MANAGEMENT AND MAINTENANCE SERVICES**

- Task 1.A. – Management with Proposer Employees
  - A. General Manager
    - Year 1 - \$389,082.22
    - Year 2 - \$391,521.94
    - Year 3 - \$410,181.61
    - Number of full-time managers or assistant managers 1
    - Number of part-time managers or assistant managers \_\_\_\_\_
- Task 1.B. – Management with District Employees (proposal alternate)
  - A. General Manager
    - Year 1 - \$\_\_\_\_\_
    - Year 2 - \$\_\_\_\_\_
    - Year 3 - \$\_\_\_\_\_
    - Number of full-time managers or assistant managers \_\_\_\_\_
    - Number of part-time managers or assistant managers \_\_\_\_\_
- Task 1.C. – Management with Third-Party Employees (proposal alternate)
  - A. General Manager
    - Year 1 - \$\_\_\_\_\_
    - Year 2 - \$\_\_\_\_\_
    - Year 3 - \$\_\_\_\_\_
    - Number of full-time managers or assistant managers \_\_\_\_\_
    - Number of part-time managers or assistant managers \_\_\_\_\_

If there would be an additional management charge if the District were to open and operate a RV storage lot, how much extra would it cost for management in Year 1, if any?

- \$ scope to be discussed

- Task 2.A. – Maintenance Staffing

- Year 1 - \$ \_\_\_\_\_
- Year 2 - \$ \_\_\_\_\_
- Year 3 - \$ \_\_\_\_\_
- Number of full-time employees performing maintenance 3
- Number of part-time employees performing maintenance 1

If a subcontractor is proposed, please indicate:

- Amount to be Paid to Subcontractor for Year 1:

\$ \_\_\_\_\_

- Mark up retained by Proposer for Year 1:

\$ \_\_\_\_\_

- Task 2.B. – Maintenance Staffing with addition of leaf pick up services along community roadways when needed (proposal alternate)

- Year 1 - \$ \_\_\_\_\_
- Year 2 - \$ scope would need to be discussed
- Year 3 - \$ \_\_\_\_\_
- Number of full-time employees performing maintenance \_\_\_\_\_
- Number of part-time employees performing maintenance \_\_\_\_\_

If a subcontractor is proposed, please indicate:

- Amount to be Paid to Subcontractor for Year 1:

\$ \_\_\_\_\_

- Mark up retained by Proposer for Year 1:

\$ \_\_\_\_\_



- Task 2.C. – Maintenance Staffing with addition of RV lot maintenance (proposal alternate)

- Year 1 - \$\_\_\_\_\_
- Year 2 - \$\_\_\_\_\_ scope would need to be discussed
- Year 3 - \$\_\_\_\_\_
- Number of full-time employees performing maintenance \_\_\_\_\_
- Number of part-time employees performing maintenance \_\_\_\_\_

If a subcontractor is proposed, please indicate:

- Amount to be Paid to Subcontractor for Year 1:

\$\_\_\_\_\_

- Mark up retained by Proposer for Year 1:

\$\_\_\_\_\_

Currently, the District's field service company performs overall maintenance of all District ponds and conservation areas under the existing agreement. That includes: maintaining the required Florida Aquatics Pesticide/Herbicide Certification; providing a monthly pond report and Conservation Area report to the District Manager; keeping record of and updating all Safety Data Sheets (SDS) and Conservation Area treatment logs; ordering required chemicals; maintaining all equipment required for spraying ponds and Conservation Areas; safely storing all chemicals used on ponds and Conservation Areas; applying chemicals to ponds and Conservation Areas in accordance with applicable laws and District policy, as needed. If Proposer were to provide a maintenance employee to provide this service, how much extra would it cost for maintenance in Year 1, if any?

- \$\_\_\_\_\_

We would recommend this be outsourced to an aquatic services provider as the most cost effective and highest performance option via an RFP. Our team would facilitate this process for the District.

8.H.  
ACKNOWLEDGEMENT

Under penalties of perjury under the laws of the State of Florida, I declare that I have read the foregoing Proposal Forms and all of the questions are fully and completely answered, and all of the information provided is true and correct.

Dated this 24 day of July, 2025.

Proposer: William J Rizzetta

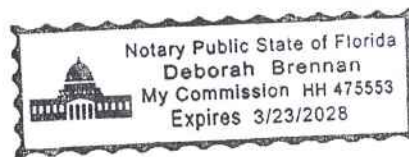
By: William J Rizzetta

Title: President

STATE OF FLORIDA  
COUNTY OF Hillsborough

The foregoing instrument was acknowledged before me this 24 day of July, 2025, by William J. Rizzetta of Rizzetta & Co., who is personally known to me or who has produced Known to me as identification, and did [ ] or did not [ ] take the oath.

Deborah Brennan  
Notary Public, State of Florida  
Print Name: Deborah Brennan  
Commission No.: HH 475553  
My Commission Expires: 3.23.2028



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