



**WINSTON TRAILS EAST
COMMUNITY DEVELOPMENT
DISTRICT**

**PALM BEACH COUNTY
REGULAR BOARD MEETING
& PUBLIC HEARING
JUNE 10, 2024
6:30 P.M.**

Special District Services, Inc.
The Oaks Center
2501A Burns Road
Palm Beach Gardens, FL 33410

www.winstontrailseastcdd.org

561.630.4922 Telephone
877.SDS.4922 Toll Free
561.630.4923 Facsimile

AGENDA
WINSTON TRAILS EAST COMMUNITY DEVELOPMENT DISTRICT
Recreation Center
5980 Winston Trails Boulevard
Lake Worth, Florida 33463
REGULAR BOARD MEETING & PUBLIC HEARING
June 10, 2024
6:30 P.M.

- A. Call to Order
- B. Proof of Publication.....Page 1
- C. Establish Quorum
- D. Additions or Deletions to Agenda
- E. Comments from the Public for Items Not on the Agenda
- F. Approval of Minutes
 - 1. April 8, 2024 Regular Board Meeting.....Page 2
- G. Public Hearing
 - 1. Proof of Publication.....Page 4
 - 2. Receive Public Comments on Adopting a Fiscal Year 2024/2025 Final Budget
 - 3. Consider Resolution No. 2024-02 – Adopting a Fiscal Year 2024/2025 Final Budget.....Page 5
- H. Old Business
- I. New Business
 - 1. Consider Resolution No. 2024-03 – Adopting a Fiscal Year 2024/2025 Meeting Schedule.....Page 12
 - 2. Consider Appointment of Audit Committee & Approval of Evaluation Criteria.....Page 14
- J. Administrative Matters
 - 1. Announce Qualifying Period
- K. Board Members Comments
- L. Adjourn

LOCALiQ

The Gainesville Sun | The Ledger
Daily Commercial | Ocala StarBanner
News Chief | Herald-Tribune
News Herald | The Palm Beach Post
Northwest Florida Daily News

PO Box 631244 Cincinnati, OH 45263-1244

PROOF OF PUBLICATION

Winston Trails Comm Dev Dist
Winston Trails Comm Dev Dist
2501 BURNS RD
STE A

PALM BEACH GARDENS FL 334105207

STATE OF WISCONSIN, COUNTY OF BROWN

Before the undersigned authority personally appeared, who on oath says that he or she is the Legal Coordinator of the Palm Beach Post, published in Palm Beach County, Florida; that the attached copy of advertisement, being a Govt Public Notices, was published on the publicly accessible website of Palm Beach County, Florida, or in a newspaper by print in the issues of, on:

10/06/2023

Affiant further says that the website or newspaper complies with all legal requirements for publication in chapter 50, Florida Statutes.

Subscribed and sworn to before me, by the legal clerk, who is personally known to me, on 10/06/2023

Legal Clerk

Notary, State of WI, County of Brown

My commission expires

Publication Cost: \$268.83

Order No: 9342034

Customer No: 730585

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1

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DENISE ROBERTS
Notary Public
State of Wisconsin

WINSTON TRAILS EAST COMMUNITY DEVELOPMENT DISTRICT FISCAL YEAR 2023/2024 REGULAR MEETING SCHEDULE

NOTICE IS HEREBY GIVEN that the Board of Supervisors of the Winston Trails East Community Development District will hold Regular Meetings of 6:30 p.m. at the Recreation Center of 5980 Winston Trails Boulevard, Lake Worth, Florida 33463, on the following dates:

October 16, 2023
November 13, 2023
December 11, 2023
January 8, 2024
February 12, 2024
March 11, 2024
April 8, 2024
May 13, 2024
June 10, 2024
July 8, 2024
August 12, 2024
September 9, 2024

The purpose of the meetings is to conduct any business coming before the Board. The meetings are open to the public and will be conducted in accordance with the provisions of Florida law. Copies of the Agendas for any of the meetings may be obtained from the District's website or by contacting the District Manager at (561) 630-4922 and/or toll free at 1-877-737-4922 prior to the date of the particular meeting.

From time to time one or more Supervisors may participate by telephone; therefore, at the location of these meetings there will be a speaker telephone present so that interested persons can attend the meetings at the above location and be fully informed of the discussions taking place either in person or by telephone communication. Meetings may be continued as found necessary to a time and place specified on the record.

If any person decides to appeal any decision made with respect to any matter considered at these meetings, such person will need a record of the proceedings and such person may need to ensure that a verbatim record of the proceedings is made at his or her own expense and which record includes the testimony and evidence on which the appeal is based.

In accordance with the provisions of the Americans with Disabilities Act, any person requiring special accommodations or an interpreter to participate at any of these meetings should contact the District Manager at (561) 630-4922 and/or toll free at 1-877-737-4922 at least seven (7) days prior to the date of the particular meeting.

Meetings may be cancelled from time to time without advertised notice.

WINSTON TRAILS EAST COMMUNITY DEVELOPMENT DISTRICT

www.winstontrailsseastcdd.org
Oct. 6, 2023 #9342034

**WINSTON TRAILS EAST COMMUNITY DEVELOPMENT DISTRICT
REGULAR BOARD MEETING
APRIL 8, 2024**

A. CALL TO ORDER

District Manager Jason Pierman called the April 8, 2024, Regular Board Meeting of the Winston Trails East Community Development District (the “District”) to order at 6:31 p.m. in the Recreation Center located at 5980 Winston Trails Boulevard, Lake Worth, Florida 33463.

B. PROOF OF PUBLICATION

Mr. Pierman presented proof of publication that notice of the Regular Board Meeting had been published in *The Palm Beach Post* on October 6, 2023, as part of the District’s Fiscal Year 2023/2024 Meeting Schedule, as legally required.

C. ESTABLISH A QUORUM

Mr. Pierman determined that the attendance of Chairman John Puleo (via phone), Vice Chairman Charles “Randy” Palo and Supervisors Debra Barreiro and Pedro Raphael constituted a quorum and it was in order to proceed with the meeting.

Also in attendance was District Manager Jason Pierman of Special District Services, Inc.

D. ADDITIONS OR DELETIONS TO AGENDA

There were no additions or deletions to the agenda.

E. COMMENTS FROM THE PUBLIC FOR ITEMS NOT ON THE AGENDA

There were no comments from the public for items not on the agenda.

F. APPROVAL OF MINUTES

1. October 16, 2023, Regular Board Meeting

Mr. Pierman presented the minutes of the October 16, 2023, Regular Board Meeting and asked if there were any questions or comments.

There being none, a **motion** was made by Mr. Palo, seconded by Ms. Barreiro and unanimously passed approving the minutes of the October 16, 2023, Regular Board Meeting, as presented.

G. OLD BUSINESS

There were no Old Business items to come before the Board.

H. NEW BUSINESS

1. Consider Resolution No. 2024-01 – Adopting a Fiscal Year 2024/2025 Proposed Budget

Resolution No. 2024-01 was presented, entitled:

RESOLUTION NO. 2024-01

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE WINSTON TRAILS EAST COMMUNITY DEVELOPMENT DISTRICT APPROVING A PROPOSED BUDGET FOR FISCAL YEAR 2024/2025; AND PROVIDING AN EFFECTIVE DATE.

A **motion** was made by Mr. Palo, seconded by Mr. Puleo and passed unanimously adopting Resolution No. 2024-01, as presented, setting the Public Hearing for June 10, 2024.

2. Discussion Regarding Required Ethics Training

Mr. Pierman noted that SDS had placed links to the free training, as well as a link to file the Form 1, on its company website, and reminded the Board that the training must be completed by the end of the calendar year.

I. ADMINISTRATIVE MATTERS

There were no Administrative Matters to come before the Board.

J. BOARD MEMBER COMMENTS

There were no further comments from the Board Members.

K. ADJOURNMENT

There being no further business to come before the Board, a **motion** was made by Ms. Barreiro, seconded by Mr. Palo and unanimously passed adjourning the Regular Board Meeting at 6:46 p.m.

Secretary/Assistant Secretary

Chair/Vice-Chair

Notice of Public Hearing
and Regular Board Meeting of the
Winston Trails East Community Development District

The Board of Supervisors (the Board) of the Winston Trails East Community Development District (the District) will hold a Public Hearing and Regular Board Meeting on June 10, 2024, at 6:30 p.m., or as soon thereafter as the meeting can be heard, at the Winston Trails Recreation Center located at 5980 Winston Trails Boulevard, Lake Worth, Florida 33463.

The purpose of the Public Hearing is to receive public comment on the Proposed Fiscal Year 2024/2025 Budget of the District. The purpose of the Regular Board Meeting is for the Board to consider any other business which may properly come before it. A copy of the Budget and/or the Agenda may be obtained from the Districts website (www.winstontrailseastcdd.org) or at the offices of the District Manager, 2501A Burns Road, Palm Beach Gardens, Florida 33410, during normal business hours. The meetings are open to the public and will be conducted in accordance with the provisions of Florida law for community development districts. Meetings may be continued as found necessary to a time and place specified on the record.

There may be occasions when one or more Supervisors will participate by telephone; therefore, a speaker telephone will be present at the meeting location so that Supervisors may be fully informed of the discussions taking place.

In accordance with the provisions of the Americans with Disabilities Act, any person requiring special accommodations or an interpreter to participate at these meetings should contact the District Manager at (561) 630-4922 and/or toll-free at 1-877-737-4922, at least seven (7) days prior to the date of the meetings. If any person decides to appeal any decision made with respect to any matter considered at this Public Hearing and Regular Board Meeting, such person will need a record of the proceedings and such person may need to ensure that a verbatim record of the proceedings is made at their own expense and which record includes the testimony and evidence on which the appeal is based.

Meetings may be cancelled from time to time without advertised notice.

Winston Trails East Community Development District

www.winstontrailseastcdd.org

May 21, 28, 2024 #10187101

RESOLUTION NO. 2024-02

A RESOLUTION OF THE WINSTON TRAILS EAST COMMUNITY DEVELOPMENT DISTRICT ADOPTING A FISCAL YEAR 2024/2025 BUDGET.

WHEREAS, the Winston Trails East Community Development District (“District”) has prepared a Proposed Budget and Final Special Assessment Roll for Fiscal Year 2024/2025 and has held a duly advertised Public Hearing to receive public comments on the Proposed Budget and Final Special Assessment Roll; and,

WHEREAS, following the Public Hearing and the adoption of the Proposed Budget and Final Assessment Roll, the District is now authorized to levy non ad-valorem assessments upon the properties within the District.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE WINSTON TRAILS EAST COMMUNITY DEVELOPMENT DISTRICT THAT:

Section 1. The Final Budget and Final Special Assessment Roll for Fiscal Year 2024/2025 attached hereto as Exhibit “A” is approved and adopted, and the assessments set forth therein shall be levied.

Section 2. The Secretary of the District is authorized to execute any and all necessary transmittals, certifications or other acknowledgements or writings, as necessary, to comply with the intent of this Resolution.

PASSED, ADOPTED and EFFECTIVE this 10th day of June, 2024.

ATTEST:

**WINSTON TRAILS EAST
COMMUNITY DEVELOPMENT DISTRICT**

By: _____
Secretary/Assistant Secretary

By: _____
Chairperson/Vice Chairperson

Winston Trails (East) Community Development District

**Final Budget For
Fiscal Year 2024/2025
October 1, 2024 - September 30, 2025**

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FINAL BUDGET
WINSTON TRAILS (EAST) COMMUNITY DEVELOPMENT DISTRICT
FISCAL YEAR 2024/2025
OCTOBER 1, 2024 - SEPTEMBER 30, 2025

	FISCAL YEAR 2024/2025 BUDGET
REVENUES	
O & M Assessments	60,920
Debt Assessments	238,779
Other Revenues	0
Interest Income	600
TOTAL REVENUES	\$ 300,299
EXPENDITURES	
Supervisor Fees	4,000
Payroll Taxes (Employer)	320
Engineering/Inspections	3,000
Management	18,000
Legal	2,000
Assessment Roll	5,000
Audit Fees	3,700
Insurance	7,100
Legal Advertisements	1,000
Miscellaneous	700
Postage	175
Office Supplies	325
Dues & Subscriptions	175
Trustee Fee	5,100
Website Management	2,000
Contingency	5,270
TOTAL EXPENDITURES	\$ 57,865
REVENUES LESS EXPENDITURES	\$ 242,434
Payment To Trustee	(224,452)
BALANCE	\$ 17,982
County Appraiser & Tax Collector Fee	(5,994)
Discounts For Early Payments	(11,988)
EXCESS/ (SHORTFALL)	\$ -
Carryover From Prior Year	0
NET EXCESS/ (SHORTFALL)	\$ -

DETAILED FINAL BUDGET
WINSTON TRAILS (EAST) COMMUNITY DEVELOPMENT DISTRICT
FISCAL YEAR 2024/2025
OCTOBER 1, 2024 - SEPTEMBER 30, 2025

	FISCAL YEAR 2022/2023 ACTUAL	FISCAL YEAR 2023/2024 BUDGET	FISCAL YEAR 2024/2025 BUDGET	COMMENTS
REVENUES				
O & M Assessments	58,870	61,505	60,920	Expenditures Less Interest & Carryover/.94
Debt Assessments	242,041	238,259	238,779	Payment To Trustee/.94
Other Revenues	0	0	0	
Interest Income	5,284	180	600	Projected At \$50.00 Per Month
TOTAL REVENUES	\$ 306,195	\$ 299,944	\$ 300,299	
EXPENDITURES				
Supervisor Fees	2,600	4,000	4,000	No Change From 2023/2024 Budget
Payroll Taxes (Employer)	199	320	320	Projected At 8% Of Supervisor Fees
Engineering/Inspections	3,358	2,500	3,000	\$500 Increase From 2023/2024 Budget
Management	18,000	18,000	18,000	As Per Contract
Legal	3,163	1,500	2,000	\$500 Increase From 2023/2024 Budget
Assessment Roll	5,000	5,000	5,000	As Per Contract
Audit Fees	3,500	3,600	3,700	\$100 Increase From 2023/2024 Budget
Insurance	6,134	6,800	7,100	Fiscal Year 2023/2024 Expenditure Was \$6,594
Legal Advertisements	414	1,000	1,000	No Change From 2023/2024 Budget
Miscellaneous	668	700	700	No Change From 2023/2024 Budget
Postage	92	175	175	No Change From 2023/2024 Budget
Office Supplies	153	325	325	No Change From 2023/2024 Budget
Dues & Subscriptions	175	175	175	No Change From 2023/2024 Budget
Trustee Fee	5,099	5,100	5,100	No Change From 2023/2024 Budget
Website Management	2,000	2,000	2,000	No Change From 2023/2024 Budget
Contingency	0	6,800	5,270	Contingency
TOTAL EXPENDITURES	\$ 50,555	\$ 57,995	\$ 57,865	
REVENUES LESS EXPENDITURES	\$ 255,640	\$ 241,949	\$ 242,434	
Payment To Trustee	(230,586)	(223,964)	(224,452)	2025 Principal & Interest Payments Less Interest
BALANCE	\$ 25,054	\$ 17,985	\$ 17,982	
County Appraiser & Tax Collector Fee	(2,282)	(5,995)	(5,994)	Two Percent Of Total Assessment Roll
Discounts For Early Payments	(11,370)	(11,990)	(11,988)	Four Percent Of Total Assessment Roll
EXCESS/ (SHORTFALL)	\$ 11,402	\$ -	\$ -	
Carryover From Prior Year	0	0	0	Carryover Balance From Prior Years
NET EXCESS/ (SHORTFALL)	\$ 11,402	\$ -	\$ -	

DETAILED FINAL DEBT SERVICE FUND BUDGET

WINSTON TRAILS (EAST) COMMUNITY DEVELOPMENT DISTRICT

FISCAL YEAR 2024/2025

OCTOBER 1, 2024 - SEPTEMBER 30, 2025

	FISCAL YEAR	FISCAL YEAR	FISCAL YEAR	
	2022/2023	2023/2024	2024/2025	
REVENUES	ACTUAL	BUDGET	BUDGET	COMMENTS
Interest Income	5,639	50	500	Projected Interest For FY 2024/2025
NAV Tax Collection	230,586	223,964	224,452	2025 Principal & Interest Payments Less Interest
Total Revenues	\$ 236,225	\$ 224,014	\$ 224,952	
EXPENDITURES				
Principal Payments	175,000	180,000	190,000	Principal Payment Due In 2025
Interest Payments	56,707	44,014	34,952	Interest Payments Due In 2025
Total Expenditures	\$ 231,707	\$ 224,014	\$ 224,952	
Excess/ (Shortfall)	\$ 4,518	\$ -	\$ -	

Series 2008 Refunding Bonds Information

Original Par Amount =	\$2,890,000	Annual Principal Payments Due =	May 1st
Interest Rate =	4.76%	Annual Interest Payments Due =	May 1st & November 1st
Issue Date =	September 2008		
Maturity Date =	May 2028		
Par Amount As Of 1/1/24 =	\$1,000,000		

WINSTON TRAILS (EAST) COMMUNITY DEVELOPMENT DISTRICT ASSESSMENT COMPARISON

	Fiscal Year 2021/2022 Assessment*	Fiscal Year 2022/2023 Assessment*	Fiscal Year 2023/2024 Assessment*	Fiscal Year 2024/2025 Projected Assessment*
Administrative For Fifty Foot Lots	\$ 117.51	\$ 113.27	\$ 118.74	\$ 117.61
<u>Debt For Fifty Foot Lots</u>	<u>\$ 361.74</u>	<u>\$ 364.76</u>	<u>\$ 359.21</u>	<u>\$ 360.00</u>
Total	\$ 479.25	\$ 478.03	\$ 477.95	\$ 477.61
Administrative For Sixty Four Foot Lots	\$ 117.51	\$ 113.27	\$ 118.74	\$ 117.61
<u>Debt For Sixty Four Foot Lots</u>	<u>\$ 463.02</u>	<u>\$ 466.90</u>	<u>\$ 459.79</u>	<u>\$ 460.80</u>
Total	\$ 580.53	\$ 580.17	\$ 578.53	\$ 578.41
Administrative For Sixty Five Foot Lots	\$ 117.51	\$ 113.27	\$ 118.74	\$ 117.61
<u>Debt For Sixty Five Foot Lots</u>	<u>\$ 470.26</u>	<u>\$ 474.19</u>	<u>\$ 466.98</u>	<u>\$ 468.00</u>
Total	\$ 587.77	\$ 587.46	\$ 585.72	\$ 585.61
Administrative For Seventy Foot Lots	\$ 117.51	\$ 113.27	\$ 118.74	\$ 117.61
<u>Debt For Seventy Foot Lots</u>	<u>\$ 506.43</u>	<u>\$ 510.67</u>	<u>\$ 502.90</u>	<u>\$ 504.00</u>
Total	\$ 623.94	\$ 623.94	\$ 621.64	\$ 621.61

* Assessments Include the Following :

4% Discount for Early Payments
1% County Tax Collector Fee
1% County Property Appraiser Fee

Community Information:

Fifty Foot Lots	98
Sixty Four Foot Lots	112
Sixty Five Foot Lots	80
<u>Seventy Foot Homes</u>	<u>228</u>
Total Units	518

Includes 1% County Tax Collector Fee, a 1% County Property Appraiser Fee and a 4% Discount for early payment of taxes.

64 Foot Lots Information

Total Units	112
<u>Prepayments</u>	<u>1</u>
Billed For Debt	111

RESOLUTION NO. 2024-03

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE WINSTON TRAILS EAST COMMUNITY DEVELOPMENT DISTRICT, ESTABLISHING A REGULAR MEETING SCHEDULE FOR FISCAL YEAR 2024/2025 AND SETTING THE TIME AND LOCATION OF SAID DISTRICT MEETINGS; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, it is necessary for the Winston Trails East Community Development District ("District") to establish a regular meeting schedule for fiscal year 2024/2025; and

WHEREAS, the Board of Supervisors of the District has set a regular meeting schedule, location and time for District meetings for fiscal year 2024/2025 which is attached hereto and made a part hereof as Exhibit "A".

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE WINSTON TRAILS EAST COMMUNITY DEVELOPMENT DISTRICT, PALM BEACH COUNTY, FLORIDA, AS FOLLOWS:

Section 1. The above recitals are hereby adopted.

Section 2. The regular meeting schedule, time and location for meetings for fiscal year 2024/2025 which is attached hereto as Exhibit "A" is hereby adopted and authorized to be published.

PASSED, ADOPTED and EFFECTIVE this 10th day of June, 2024.

ATTEST:

**WINSTON TRAILS EAST
COMMUNITY DEVELOPMENT DISTRICT**

By: _____
Secretary/Assistant Secretary

By: _____
Chairperson/Vice Chairperson

**WINSTON TRAILS EAST COMMUNITY DEVELOPMENT DISTRICT
FISCAL YEAR 2024/2025 REGULAR MEETING SCHEDULE**

NOTICE IS HEREBY GIVEN that the Board of Supervisors of the Winston Trails East Community Development District will hold Regular Meetings at 6:30 p.m. at the Recreation Center at 5980 Winston Trails Boulevard, Lake Worth, Florida 33463, on the following dates:

October 14, 2024 (*Columbus Day*)

November 11, 2024 (*Veterans Day*)

December 9, 2024

January 13, 2025

February 10, 2025

March 10, 2025

April 14, 2025

May 12, 2025

June 9, 2025

July 14, 2025

August 11, 2025

September 8, 2025

The purpose of the meetings is to conduct any business coming before the Board. The meetings are open to the public and will be conducted in accordance with the provisions of Florida law. Copies of the Agendas for any of the meetings may be obtained from the District's website or by contacting the District Manager at (561) 630-4922 and/or toll free at 1-877-737-4922 prior to the date of the particular meeting.

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Meetings may be cancelled from time to time without advertised notice.

WINSTON TRAILS EAST COMMUNITY DEVELOPMENT DISTRICT

www.winstontrailseastcdd.org

PUBLISH: THE PALM BEACH POST

**WINSTON TRAILS EAST COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS**

**District Auditing Services for Fiscal Years 2023/2024, 2024/2025 and 2025/2026
With Two Year Option (2026/2027 and 2027/2028)
Palm Beach County, Florida**

**WINSTON TRAILS EAST COMMUNITY DEVELOPMENT DISTRICT
AUDITOR SELECTION INSTRUCTIONS TO PROPOSERS**

SECTION 1. DUE DATE. Sealed proposals must be received no later than August 22, 2024 at 4:00 p.m., at the offices of District Manager, located at 2501A Burns Road, Palm Beach Gardens, Florida 33410.

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

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

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

SECTION 5. SUBMISSION OF PROPOSAL. Submit one (1) copy of the Proposal Documents and one digital copy, and other requested attachments at the time and place indicated herein, which shall be enclosed in an opaque sealed envelope, marked with the title “Auditing Services – Winston Trails East Community Development District” on the face of it.

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

**WINSTON TRAILS EAST COMMUNITY DEVELOPMENT DISTRICT
AUDITOR SELECTION
EVALUATION CRITERIA**

1. *Ability of Personnel (10 Points).*

(E.g., geographic locations of the firm’s headquarters or permanent office in relation to the project; capabilities and experience of key personnel; evaluation of existing work load; proposed staffing levels, etc.)

2. *Proposer’s Experience (10 Points).*

(E.g. past record and experience of the Proposer in similar projects; volume of work previously performed by the firm; past performance for other Community Development Districts in other contracts; character, integrity, reputation of Proposer, etc.)

3. *Understanding of Scope of Work (10 Points).*

Extent to which the proposal demonstrates an understanding of the District’s needs for the services requested.

4. *Ability to Furnish the Required Services (10 Points).*

Present ability to manage this project and the extent to which the proposal demonstrates the adequacy of Proposer’s financial resources and stability as a business entity necessary to complete the services required (E.g. the existence of any natural disaster plan for business operations).

5. *Price (10 Points).*

Points will be awarded based upon the price bid for the rendering of the services and reasonableness of the price to the services.

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

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

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

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

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

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

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

SECTION 13. PROTESTS. Any protest regarding the Proposal Documents, must be filed in writing, at the offices of the District Manager, within seventy-two (72) hours after receipt of the Request for Proposals and Evaluation Criteria or other contract documents. The formal protest setting forth with particularity the facts and law upon which the protest is based shall be filed within seven (7) calendar days after the initial notice of protest was filed. Failure to timely file a notice of protest or failure to timely file a formal written protest shall constitute a waiver of any right to object or protest with respect to the aforesaid Request for Proposals, Evaluation Criteria, or other contract documents.

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

SECTION 15. REJECTION OF ALL PROPOSALS. The District reserves the right to reject any and all bids, with or without cause, and to waive technical errors and informalities, as determined to be in the best interests of the District.