



Carrollwood Recreation District
May 8, 2023

Board of Trustees

Executive Committee Meeting - 6:00 p.m.

Mark Snellgrove
President

Regular Meeting Agenda - 6:30 p.m.

Dr. Anna Brown
Vice President
Recreation Center/
Tennis Chairwoman

1. Call Regular Meeting to Order

2. Roll Call

Mark Georgiades
Treasurer

3. Determination of Quorum

4. Public Comment

Joseph Costa
Secretary

5. Motion to Approve the Consent Agenda

- Approval of May 8, 2023, Regular Meeting Agenda
- Approval of April 2023, Independent Accountant's Compilation Report
- Approval of April 10, 2023, Executive Committee Meeting Minutes
- Approval of April 10, 2023, Regular Meeting Minutes

Michael Carelli
Original Carrollwood
Park Chairman

6. Regular Agenda Items

Jack Griffie
Scotty Cooper Park
Chairman

Treasurer:

- Review & Discuss Draft Budget for FY 2023-2024.
- Public Hearing Scheduled on June 12, 2023.

Christina Price
Community
Development
Chairwoman

President:

- Discuss Resident Request for a Defibrillator.
- New "Short-Form" Contract for Goods & Services.
- Per Trustee Carelli's Recommendation: Review Doubling the Payment Authorization Requirements for each Limit in Section 4 of the CRD Bylaws, to be Voted on at the June 12th Regular Meeting.

Dan Seeley
Grounds Chairman

Kevin Shidler
White Sands Beach
Chairman

Recreation Center/ Tennis Chairwoman:

- Review Gutter & Drain Proposals & Vote if Required.
- Review Interior Painting Proposals & Vote if Required.



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Development
Chairwoman

Dan Seeley
Grounds Chairman

Kevin Shidler
White Sands Beach
Chairman

Original Carrollwood Park Chairman:

- Review New Clay & Grading Proposals of Softball Field & Vote if Required.

White Sands Beach Chairman:

- Review Lab Results from the Swim Side.
- Recap of Meeting with Sheriff's Office.
- Discuss New Procedure for Incident Reports with Guard Service.

Scotty Cooper Park Chairman:

Grounds Chairman:

Community Development Chairwoman:

- Review Reserve Study Proposals & Vote if Required.
- Review Signage Proposals/Renderings & Vote if Required.

CCA Liaison:

7. Other Business

8. Adjourn

Carrollwood Recreation District Board
Executive Meeting Minutes
April 10, 2023

THESE MEETING MINUTES ARE NOT A WORD FOR WORD TRANSCRIPT OF WHAT WAS SAID. THE NOTES CAPTURE THE ESSENCE AND MEANING OF ALL DIALOGUE WHILE TRANSCRIBING EXACT PHRASING AS CLOSELY AS POSSIBLE.

1. Call To Order

- President Mark Snellgrove called the meeting to order at 6:00 p.m.

2. Roll Call (rolled not called for Executive Meeting)

Board Members present:

Michael Carelli	Original Carrollwood Park	Present
Joseph Costa	Secretary	Not Present
Dan Seeley	Grounds	Present
Dr. Anna Brown	VP - Rec Center/Tennis	Present
Mark Georgiades	Treasurer	Present
Jack Griffie	Scotty Cooper Park	Not Present
Chrissie Price	Community Development	Present
Kevin Shidler	White Sands Beach	Not Present
Mark Snellgrove	President	Present

- President Snellgrove made corrections to the March 13, 2023, meeting minutes.
- No new business.
- Executive Meeting Adjourned at 6:30 p.m.

Carrollwood Recreation District Board
Regular Meeting Minutes
April 10, 2023

THESE MEETING MINUTES ARE NOT A WORD FOR WORD TRANSCRIPT OF WHAT WAS SAID. THE NOTES CAPTURE THE ESSENCE AND MEANING OF ALL DIALOGUE WHILE TRANSCRIBING EXACT PHRASING AS CLOSELY AS POSSIBLE.

1. Call To Order

- President Mark Snellgrove called the meeting to order: 6:30 p.m.

2. Roll Call

Board Members present:

Michael Carelli	Original Carrollwood Park	Present
Joseph Costa	Secretary	Not Present
Dan Seeley	Grounds	Present
Dr. Anna Brown	VP - Rec Center/Tennis	Present
Mark Georgiades	Treasurer	Present
Jack Griffie	Scotty Cooper Park	Not Present
Chrissie Price	Community Development	Present
Kevin Shidler	White Sands Beach	Present
Mark Snellgrove	President	Present

3. Determination of Quorum

- Yes: seven trustees present

4. Public Comment

- **Resident:** Dr. Rick Dillon inquired about how to request a traffic signal enhancement. Wants to make the intersection of Lacewood Road and McFarland Road more visible.
- **Resident:** Mike Arnold had the same request for Orange Grove Drive and Carrollwood Drive.
- **Residents:** Bennett Jacobson, Jared Jones, and Mike Shaw present.
- **Resident:** Bob Tom Tomczak – attending for the TECO presentation.
- **PUBLIC COMMENT CLOSED AT 6:36 p.m.**

5. Motion to Approve the Consent Agenda

- Approval of April 10, 2023, Regular Meeting Agenda
- Approval of March 2023, Independent Accountant’s Compilation Report
- Approval of March 13, 2023, Executive Committee Meeting Minutes
- Approval of March 13, 2023, Regular Meeting Minutes
- **Motion by Trustee Georgiades** to Approve the Consent Agenda
- **Motion** Seconded by **Trustee Carelli**
- **Vote:** 7 in favor 0 opposed

6. Regular Meeting

Mark Georgiades — Treasurer Matters:

- Request for Committee Budget Proposals for FY 2023-2024. Budget draft to be provided at the May meeting, with a Public Hearing scheduled for June 12th.
- **Treasurer** Georgiades requested a brief Board discussion for next year's budget planning. **Trustee** Seeley reported that irrigation upgrades are needed throughout the community, as well as tree trimming. There was also a Board discussion about raising the height of the entrance wall at White Sands Beach along with a new controlled access gate.

Mark Snellgrove – President

- **Bob Tomczak**, a resident & retired TECO Vice President invited Chip Whitworth, current V.P. of TECO to the meeting. Bob has lived on Lipsey Road since 1966. Bob says there has been a lot of construction going on with new switches, new cables, water, and cable utilities being installed. He reminds us that we had electricity interruptions over the past 2-years.
- **Chip Whitworth:** The TECO Storm Protection Plan (SPP) includes increased vegetation management (tree trimming). TECO has doubled its budget for this activity. Also looking at tree removals where it makes sense to do so. Feeder hardening: large trunk distribution lines with laterals extending to homes. The feeder trunk lines are getting upgraded poles, changing conductors, installing sensing devices to speed identification of faults during a power outage. They are also adding underground lines. The feeder lines to homes are being placed underground where there is dense vegetation. For the first time in Chip's career, lighting was the number one reason for outages in 2022 (instead of trees). This plan will be in progress for a very long time. There should be an improvement in reliability along with this. A study is conducted every three years and the vegetation, number of customers, and historical hurricane damage are used to determine where the SPP will be implemented.
- **Board members & the Public** asked questions and discussed our specific community needs with Chip. Chip will connect us with the TECO community liaison (community outreach folks with SPP) to provide more information about the work in progress. **Trustee** Seeley volunteered to serve as the point of contact for the Board.
- **President Snellgrove** read aloud an email from Alyssa Shafii Campbell, a speech-language pathologist who teaches summer camp classes. Her parents live on Carrollwood Drive and she was able to rent the Recreation Center last summer. She has been provided with an opportunity to rent other facilities at a much cheaper rate. She asked if the Board would be willing to lower the daily rate to \$115.00. Currently, Janet reported to **President Snellgrove** that the small meeting

room is only rented 1-2 times per month. **Trustee Carelli** suggested if she committed to renting for six weeks, the daily rental rate can be \$145.00. This would equal paying the full price for five and getting the 6th free. The Board approved **Trustee Carelli's** recommendation.

- **President Snellgrove** read aloud another email from CCA Board member Jim Powell, who had received a request from the Tampa Bay Ski Show Team to hold a 30-year celebration banquet at the Recreation Center. Jim indicated that he would sign the room rental contract as a resident. The Board briefly discussed the request, and **Trustee Carelli & Trustee Shidler** indicated because the ski show team has provided longstanding service to our community, the Board will only require the deposit and a setup / cleaning fee of \$100.00. As a gesture of our community's appreciation, the rental fee will be waived. The Board approved this also.
- **President Snellgrove** read aloud another email request from an OC resident for Grace Lutheran Church to hold Easter Sunrise Service at White Sands Beach for 2024. There are usually 50-65 attendees, and many are OC residents. It would require allowing early park access. The Board approved the request but will require a certificate of liability insurance and it must be finished by 9:00 a.m.

Michael Carelli — Original Carrollwood Park:

- **Trustee Carelli:** provided bids for 7-benches that need to be replaced. There are 5 at OCP and 2 at SCP. He has found a vendor that offers free shipping.
- **Motion by Trustee Carelli** for authorization to purchase 5-Jameson recycled plastic benches at a cost of \$5,565.00 for OCP; and 2-Jameson recycled plastic benches at a cost of \$2,226.00 for SCP. TOTAL PURCHASE COST: \$7,791.00.
- **Motion** Seconded by **Trustee Shidler**
- **Vote:** 7 in favor 0 opposed
- **Trustee Carelli** requested authorization to purchase playground mulch at a cost of \$61.33 per cubic yard - installed. The County contract that we could purchase from was \$50 per cubic yard but did-not include installation and would be delivered on multiple pallets that would require installation. Another vendor was at a cost of \$51.74 per cubic yard but did-not include installation either.
- **Motion by Trustee Carelli** to award ASI Landscape Management the contract to install 88 cubic yards of playground mulch at OCP that cost \$5,397.28; and to install 50 cubic yards of playground mulch at SCP that cost \$3,066.64.
- **Motion** Seconded by **Trustee Price**
- **Vote:** 7 in favor 0 opposed
- **Trustee Carelli** recommended that the Board consider doubling the payment authorization requirements for each limit in section 4 of the Board bylaws, this would be consistent with doubling the tax cap assessment.

Kevin Shidler — White Sands Beach:

- **Trustee Shidler:** lab results from the swim side look good.
- **Trustee Shidler:** the new guard service began on Monday, March 27th. Resident feedback has been positive about the change in service.
- **Trustee Shidler** recommended that the Board purchase a tablet for the guard to use to have an electronic record and potentially a way to track violations.
- **Trustee Shidler** also discussed the need to manage the 25-person per resident rule. Some residents are taking advantage of the rule.
- **Trustee Shidler** recommends that the Board find a process to allow 14+ age residents to access the park without a parent.

Jack Griffie — Scotty Cooper Park:

- **Trustee Griffie:** Not Present.

Dr. Anna Brown — VP & Recreation Center & Tennis:

- **Trustee Brown** presented three gutter proposals for discussion. The lowest bid needs further investigation to make sure the leaf guard installed is the same quality and materials as the ones on the other proposals. **Trustee Brown** will bring the information to the May board meeting for final consideration.

Dan Seeley — Grounds

- **Trustee Seeley:** presented the bids for tree trimming at the Recreation Center.
- **Motion by Trustee Seeley** to award a contract to Omega Tree & Nursery for tree trimming at the Recreation Center in the amount of \$5,950.00.
- **Motion** Seconded by **Trustee Carelli**
- **Vote:** 7 in favor 0 opposed
- **Trustee Seeley** discussed plans for plants in the entry way.
- **Trustee Seeley** discussed a quote for irrigation that was presented to him.
- **Trustee Seeley** reviewed proposals for pressure washing @ White Sands Beach and will approve the lower quote (\$750.00).

Chrissy Price — Community Development

- **Trustee Price:** recommended that the Board conduct a Reserve Study: Long-term financial assessment by a Professional Firm which includes future cost repairs, maintenance, and facilities replacement. The Trustee is participating in the process for Learning Gate Community School, a charter school where her children attend. The Board recommended that we solicit for bids to determine the cost.
- **Trustee Price:** The sign RFP is in the works. The dog park sign will also be included.

7. Other Business

- **Trustee Carelli** announced that he has listed his house for sale. When it sells, he will be required to resign from the Board.

8. Adjournment

- Public comment reopened.
- Dr. Rick Dillon asked about the condition of the grill at White Sands Beach.
- Resident Mike Shaw asked about the electrical box repair at White Sands Beach. President Snellgrove indicated that the electrician is scheduled to come out on Wednesday, April 12th.

- **Trustee Shidler:** Made a motion to adjourn.
- **Motion** Seconded by **Trustee Carelli**
- **Vote:** 7 in favor; 0 opposed
- The meeting ended at 8:24 p.m.

Meeting minutes recorded by Trustee Brown.

Carrollwood Recreation District Board
Executive Meeting Minutes
March 13, 2023 - **Corrected**

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1. Call To Order

- President Mark Snellgrove called the meeting to order at 6:00 p.m.

2. Roll Call (rolled not called for Executive Meeting)

Members present:

Michael Carelli	Original Carrollwood Park	Not Present
Joseph Costa	Secretary	Present
Dan Seeley	Grounds	Not Present
Dr. Anna Brown	VP - Rec Center/Tennis	Not Present
Mark Georgiades	Treasurer	Present
Jack Griffie	Scotty Cooper Park	Present
Chrissie Price	Community Development	Not Present
Kevin Shidler	White Sands Beach	Not Present
Mark Snellgrove	President	Present

- President Snellgrove made corrections to the February 13, 2023, meeting minutes.
- No new business.
- Executive Meeting Adjourned at 6:30 p.m.

Carrollwood Recreation District Board

Regular Meeting Minutes

March 13, 2023 – Corrected

THESE MEETING MINUTES ARE NOT A WORD FOR WORD TRANSCRIPT OF WHAT WAS SAID. THE NOTES CAPTURE THE ESSENCE AND MEANING OF ALL DIALOGUE WHILE TRANSCRIBING EXACT PHRASING AS CLOSELY AS POSSIBLE.

1. Call To Order

- President Mark Snellgrove called the meeting to order: 6:30 p.m.

2. Roll Call

Trustees:

Members present:

Members present:

Michael Carelli	Original Carrollwood Park	Not Present
Joseph Costa	Secretary	Present
Dan Seeley	Grounds	Arrived at 6:50 p.m. - Present
Dr. Anna Brown	VP - Rec Center/Tennis	Not Present
Mark Georgiades	Treasurer	Present
Jack Griffie	Scotty Cooper Park	Present
Chrissie Price	Community Development	Not Present
Kevin Shidler	White Sands Beach	Present
Mark Snellgrove	President	Present

3. Determination of Quorum

- Yes: six trustees present at 6:50 p.m. [**Trustee Seeley** arrived at 6:50 p.m.]

4. Public Comment

- **Resident:** Dr. Rick Dillon
- Jason Klimis from ESS Global (a security company)
- **PUBLIC COMMENT CLOSED AT 6:35 p.m.**

5. Motion to Approve the Consent Agenda

- Approval of March 13, 2023, Regular Meeting Agenda
- Approval of February 2023, Independent Accountant’s Compilation Report
- Approval of February 13, 2023, Executive Committee Meeting Minutes
- Approval of February 13, 2023, Regular Meeting Minutes
- Approval to Award Tri-County Tree and Landscaping, Inc. a Contract in the Amount of \$2,800.00 for Duck Island; because Jimmy Fosters Tree Service would-not provide an Acord Certificate of Liability Insurance.

- **Motion by Trustee Costa** to Approve the Consent Agenda
- **Motion** Seconded by **Trustee Griffie**
- **Vote:** 6 in favor 0 opposed

6. Regular Meeting

Mark Georgiades — Treasurer Matters:

- **Motion by Trustee Georgiades:** to accept the Independent Auditors' Report; Fiscal Year Ending September 20, 2022, from Brimmer, Burek and Keelan LLP.
- **Motion** Seconded by **Trustee Griffie**
- **Vote:** 6 in favor 0 opposed

Mark Snellgrove – President

- **President Snellgrove:** Introduced **Jason Klimis from ESS Global**, who explained how the ESS guard service works. The company does security for the NY Yankees Spring Training as well as for some of the players and coaches. He also explained why his staff is more conscientious and consistent than guards at other security companies. **Trustee Shidler** presented reasons why ESS Global is the best choice. He also explained that the contract period would run from March 1st to mid-October for 7-days per week; then change to Friday, Saturday, Sunday, from mid-October until March 1st. **Jason Klimis** indicated that he needed 2-weeks to staff the position, so the anticipated start date would be the last week of March.
- **Motion by Trustee Costa** to Award a contract to ESS Global, with an option for annual renewals, provided both parties agree to renew.
- **Motion** Seconded by **Trustee Shidler**
- **Vote:** 6 in favor 0 opposed
- **President Snellgrove** is working with our Attorney about simplifying our current contract for vendors.

Michael Carelli — Original Carrollwood Park:

- **Trustee Carelli:** Not Present

Kevin Shidler — White Sands Beach:

- Lab results were good.
- The Trustee noted that the new guard service from ESS will be money well spent.

Jack Griffie — Scotty Cooper Park:

- **Trustee Griffie:** Detailed improvements made to the entrance at SCP to prevent kids from climbing over to entrance columns.

Dr. Anna Brown — VP & Recreation Center & Tennis:

- **Trustee Brown** Not Present.

Dan Seeley — Grounds

- **Trustee Seeley:** The Trustee does not want to wait until storm season to have the trees around the Recreation Center trimmed. As the Rec Center is a tangible asset, it should be protected. The Trustee estimates the cost might be upwards of \$15,000 dollars. The Trustee will obtain estimates.
- TECO came out and installed new covers on their boxes and replaced some lights.
- DAVEY tree service has been trimming trees in the neighborhood for TECO.
- **Trustee Georgiades** asked if there is a specific group trimming trees. **Trustee Seeley** responded that he is displeased with the quality of the current trimmer's performance. He is also having ASI check the irrigation system.

Chrissy Price — Community Development

- **Trustee Price:** Not Present

7. Other Business

- **No New Business.**

8. Adjournment

- Public comment reopened.
- **Trustee Costa:** Made a motion to adjourn.
- **Motion** Seconded by **Trustee Georgiades**
- **Vote:** 6 in favor; 0 opposed
- Meeting ended at 8:01 p.m.

Meeting minutes recorded by Secretary Costa

Carrollwood Recreation District

Proposed Budget

October 2023 - September 2024

Assessment Rate: \$800 per OC Home

May 8, 2023 Regular Meeting

	<u>Total</u>
Income	
GENERAL	
605 Rec Center Room Charges	24,000.00
610 Interest	7,500.00
615 Special Assessments	660,400.00
616 Special Assessments - Reserve Fund Replenish	50,000.00
620 Other	0.00
Total Income	\$ 741,900.00

Expenses

03 PRESIDENT

820 Contingency & Other President	10,500.00
825 Gatekeeper Service	4,000.00
830 Insurance - Bonds	250.00
835 Insurance - Officer D&O	7,000.00
845 Insurance - Prop/Liab/Umbrella	55,000.00
850 Insurance - Workers Comp	2,500.00
870 Operating Supplies	9,000.00
900 Professional Services	7,000.00
915 Cleaning Contract	10,000.00
960 Utilities - TECO	18,500.00
965 Utilities - Trash	3,500.00
970 Utilities - Water	11,000.00

Total 03 PRESIDENT **\$ 138,250.00**

05 TREASURER

805 Accounting-Bookkeeper	10,000.00
810 Accounting - Auditing	10,000.00
815 Accounting - Bank Charges/Fees	250.00
875 Board Fee - State	175.00
910 Property Taxes - Non-Ad Valorem	500.00
920 Rent/Leases - CCA	50,000.00

Total 05 TREASURER **\$ 70,925.00**

07 WHITE SANDS BEACH

855 Lake Testing	300.00
924 Repairs & Maint WSB	20,000.00
940 Guard Service WSB	65,000.00
985 Capital Improvements WS Beach	5,000.00

Total 07 WHITE SANDS BEACH **\$ 90,300.00**

09 SCOTTY COOPER PARK	
925 Repairs & Maint SCP	20,000.00
986 Capital Improvements SCP	10,000.00
Total 09 SCOTTY COOPER PARK	\$ 30,000.00
11 ORIGINAL CARROLLWOOD PARK	
926 Repairs & Maint OCP	14,000.00
987 Capital Improvements OCP	16,000.00
Total 11 Original Carrollwood Park	\$ 30,000.00
13 TENNIS	
927 Repairs & Maintenance Tennis	7,000.00
Total 13 TENNIS	\$ 7,000.00
15 RECREATION CENTER	
865 Office Supplies Rec Center	4,000.00
885 Payroll Taxes	4,000.00
890 Pest Control Rec Center	1,000.00
895 Postage	500.00
928 Repairs & Maint Rec Center	18,000.00
930 Salary - Maintenance	19,000.00
935 Salary - Office	20,000.00
936 Travel - Mileage Reimbursement	925.00
941 Security Monitoring Rec Center	4,000.00
950 Telephone	4,000.00
988 Capital Improvement Rec Center	0.00
Total 15 RECREATION CENTER	\$ 75,425.00
17 GROUNDS	
860 Landscaping Monthly	85,000.00
929 Repairs & Maint Grounds	100,000.00
955 Tree Trimming	50,000.00
990 Capital Improvements - Grounds	0.00
Total 17 GROUNDS	\$ 235,000.00
19 COMMUNITY DEVELOPMENT	
989 Capital Improvements Comm Dev	15,000.00
Total 19 COMMUNITY DEVELOPMENT	\$ 15,000.00
Total Expenses	\$ 691,900.00
Total Income	\$ 741,900.00
Excess Income Over Expenses	\$ 50,000.00

SHORT FORM AGREEMENT FOR GOODS AND SERVICES

This Short Form Agreement for Goods and Services (“Agreement”) is made this ____ day of _____, 20____, by and between Carrollwood Recreation District, a special district of the State of Florida organized and existing pursuant to Ch. 99-418, Laws of Florida, whose address is 3515 McFarland Rd, Tampa, FL 33618 (the “District”) and _____, a _____, with its principal place of business at _____ (“Seller”) for the purchase of goods and performance of services described hereafter pursuant to the terms contained in this Agreement.

THE PROJECT: _____ (“Project”)

1. **Goods to be provided.** Seller shall furnish the goods for the Project, as more specifically described in Attachment I, at the total price(s) set forth opposite each item and by the delivery date(s) stated within Attachment I.

2. **Services to be Provided.** Seller shall furnish services at the Project, the scope, prices and corresponding timeframes of which are all specified within Attachment I.

3. **Contract.** The Contract consist of this Agreement, the attached General Terms and Conditions, the Description of Goods and Services, attached hereto and made a part hereof as Attachment I, and the Insurance Requirements attached hereto and made a part hereof as Attachment II.

In the event of any conflict between the General Terms and Conditions and any of the exhibits, including without limitation the Description of Goods and Services, the conflict shall be resolved so as to give effect to the overall intent of the Contract, as reasonably determined by District.

SELLER:

DISTRICT:
CARROLLWOOD RECREATION DISTRICT

By: _____

By: _____

Print Name: _____

Print Name: _____

Title: _____

Title: _____

Date: _____

Date: _____

Seller’s License No: _____

GENERAL TERMS AND CONDITIONS

1. **Complete Agreement.** This Contract contains all the terms and conditions agreed upon by the parties hereto, and no other terms or agreements, oral or otherwise, except as expressly incorporated herein, respecting the subject matter of this Contract shall be deemed to exist, or to bind any of the parties hereto. This Contract shall be binding upon, and inure to the benefit of, District and Seller and their respective heirs, successors, personal representatives and permitted assigns. No other agreement or course of prior dealings between the parties nor any usage of trade shall be relevant or admissible to supplement, explain, or vary any of the terms or conditions of this Contract. Time is of the essence with respect to Seller's performance hereunder. Failure to furnish goods by the required delivery date(s) or perform services as required hereunder shall give District the right to cancel any goods not yet delivered or services not yet performed without additional charge.

3. **Payment.** Unless otherwise noted in the Contract, the specified price(s) include all sales, use and other similar taxes imposed by law upon, or on account of the manufacture, sale or delivery of the materials or services covered by this Contract. The price(s) stated in the Contract are not subject to escalation unless otherwise expressly stated in this Contract. Subject to the other terms and conditions of the Contract, payment will be made promptly after proper performance and acceptance of the services required hereunder. District may deduct from any amounts otherwise due or to become due to Seller under this Contract or any other agreement between Seller and District, any sum or sums owed to District from Seller arising under this Contract or any other agreement between Seller and District. If as a result of any of the goods or services to be provided by Seller hereunder, Seller or anyone for whom Seller is legally liable should have any lien rights against any of District's property, then as a condition precedent to any payment obligation of District hereunder and upon demand from District, Seller shall furnish to District a waiver of lien and release on the form designated by District. Late payments shall accrue interest from thirty calendar days beyond the date payment was due until payment is received at the rate of six percent (6%) per annum.

4. **Nonconforming Goods or Services.** All goods not fully meeting specified or implied standards or otherwise not in compliance with the requirements of this Contract, or shipped contrary to instructions, or substituted for goods described, may be rejected by District and returned or held at Seller's expense and risk. Services not conforming to the terms of this Contract shall be deemed defective services. If required by District, Seller shall (as directed by District) correct all defective services. Should District determine, in its sole opinion, it is in District's best interest to accept nonconforming goods or services, District may do so. Seller shall bear all direct, indirect and consequential costs of such correction made necessary thereby, and shall hold the District harmless for the same.

5. **District's Termination for Convenience.** District may, at its convenience, and upon written notification to Seller, terminate or suspend all or any portion of this Contract. In such event, Seller shall receive payment for goods shipped prior to Seller's receipt of such notice and for services actually performed prior to Seller's receipt of such notice. Seller shall not be entitled to any recovery on account of profit or unabsorbed overhead with respect to goods not shipped or services not actually performed, or on account of future work, as of the effective date of termination or suspension.

6. **Compliance with Laws.** Seller's performance shall strictly conform to and comply with all applicable laws, rules, regulations, codes, safety orders, labor agreements, and working conditions to which it is subject, including but not limited to all state, federal, and local non-discrimination in employment provisions and all local regulations and building codes. As part of the specified price(s), Seller shall be responsible for obtaining all permits necessary to perform the services hereunder. Seller shall initiate the permitting process within one day of the execution of the Contract.

7. **Indemnification.** To the fullest extent permitted by law, Seller agrees to indemnify, defend and hold District and its agents or consultants (collectively "Indemnitees") from and against all claims, damages, losses and expenses, including but not limited to attorneys' fees and costs, arising out of or

resulting from its performance hereunder, provided that such claim, damage, loss or expense is attributable to bodily injury, sickness, disease or death, or to injury to or destruction of tangible property including loss of use or economic loss resulting therefrom, but only to the extent that such claim, damage, loss or expense is caused by Seller or anyone for whom it is liable. Such obligation shall not be construed to negate, abridge, or reduce other rights or obligations of indemnity which would otherwise exist as to a party or person described in this Indemnification. Seller's obligation to indemnify and defend under this Indemnification will survive the expiration or earlier termination of this Contract until it is determined by final judgment that an action against the Indemnitee for the matter indemnified hereunder is fully and finally barred by the applicable statute of limitations.

8. **Applicable Law.** Interpretation of this Contract and the rights of the parties hereunder shall be construed under and governed by the laws of the state of Florida.

9. **Dispute Resolution/Waiver of Jury Trial.** Prior to the initiation of any action or proceeding permitted by this Contract to resolve disputes between the parties, the parties shall make a good faith effort to resolve any such disputes by negotiation between representative with decision-making power. Any litigation between Seller and District, whether arising out of the Contract or any breach thereof, shall be brought, maintained and pursued only in the appropriate state court in and for Hillsborough County, Florida, such court having sole and exclusive venue and jurisdiction for any such action between Seller and District. Seller and District consent and submit to the jurisdiction of any such court. In the event of any litigation between the parties arising out of or relating to the Contract, the prevailing party shall be entitled to recover its reasonable attorneys' and paralegals' fees and costs through all trial and appellate levels of litigation, and in any settlement, mediation, bankruptcy or administrative proceedings, including attorneys' fees, paralegals' fees and costs incurred in litigating entitlement to attorneys' fees, paralegals' fees and costs, as well as in determining or quantifying the amount of recoverable attorneys' fees, paralegals' fees and costs. **DISTRICT AND SELLER EXPRESSLY WAIVE ALL RIGHTS TO TRIAL BY JURY REGARDING ANY LITIGATION BETWEEN DISTRICT AND SELLER WHETHER ARISING OUT OF OR RELATING TO THIS CONTRACT.**

10. **Insurance.** Prior to commencing any services at the Project site, Seller shall provide, pay for, and maintain the types of insurance described in Attachment II hereto.

11. **Severability.** In the event any provision, or any part or portion of any provision of this Contract shall be deemed or defined by any law or order any court or any governmental agency, or regulatory body having jurisdiction over either party, or held or declared by a court of competent jurisdiction to be unlawful, invalid, void or otherwise unenforceable, the rights and obligations of the parties shall be reduced or abated only to the extent required to remove or cure such illegal or unenforceable portion, so long as the Contract is not affected in a manner or to the extent which would render it economically, technically, materially, or commercially infeasible to either party.

12. **Non-Waiver / Construction.** The failure of the District to enforce at any time or for any period of time any one or more of the provisions of this Contract shall not be construed to be and shall not be a waiver of any such provision or provisions or of the District's right thereafter to enforce each and every such provision. The parties hereto acknowledge that they have carefully reviewed this Contract and have had an opportunity to be advised by counsel of their choosing with respect thereto, and that they understand its contents and agree that this Contract shall not be construed more strongly against any party hereto, regardless of who is responsible for its preparation.

13. **Independent Contractor.** Seller agrees that Seller is an independent contractor, and that no tax, assessment or legal liability of Seller, or of its agents or employees, becomes by reason of this Contract an obligation of the District.

ATTACHMENT I

DESCRIPTION OF GOODS AND SERVICES

(See Attached)

ATTACHMENT II

INSURANCE REQUIREMENTS

The amounts and types of insurance shall conform to the minimum requirements listed below. All self-insured retentions or deductibles will be Seller's sole responsibility.

I. Worker's Compensation and Employers Liability Insurance shall be maintained by during the term of this Contract for all employees engaged under this Contract, in accordance with all applicable laws. The amount of such insurance shall not be less than:

Workers' Compensation -	Statutory Requirements	
Employers Liability -	\$1,000,000	Limit Each Accident
	\$1,000,000	Limit Disease – Each Employee
	\$1,000,000	Limit Disease – Policy Limit

II. Commercial General Liability Insurance, written on an "occurrence" basis, shall be maintained by Seller. Coverage, as provided by 1986 (or later) ISO commercial general liability form, shall include, but not be limited to, Bodily Injury, Contractual for this Contract, Property Damage, Personal Injury and Fire Legal Liability Coverages. Seller must also include Products & Completed Operations, with the Completed Operations Coverage maintained for this Project for not less than ten (10) years following completion and acceptance by District. Limits of coverage shall not be less than the following for Bodily Injury, including Death, Property Damage and Personal Injury Combined Single Limits:

Each Occurrence	\$1,000,000
Damage to Rented Premises (each occurrence)	\$1,000,000
Medical Expenses (any one person)	\$ 10,000
Personal and Advertising Injury	\$1,000,000
General Aggregate	\$2,000,000
Products - Completed Operations Aggregate	\$2,000,000

The aggregate limits shall be separately applicable to this Project through the use of an endorsement approved by District.

III. Automobile Liability Insurance shall be maintained by Seller as to ownership, maintenance, and use, including loading and unloading, of all owned, non-owned, leased or hired vehicles with limits of not less than:

Bodily Injury, including Death & Property Damage Liability	\$1,000,000 Combined Single Limit Each Accident
--	--

IV. Personal Property Insurance shall be maintained by Seller on an "all risk" basis for no less than the full replacement cost value of Seller's tools and equipment. District assumes no responsibility whatsoever for theft or damage sustained to Seller's personal property.

V. Miscellaneous:

Insurance carriers must have a "Best's Rating" and a "Financial Size Category" as set forth in the most current edition of Best's Key Rating Guide acceptable to District. Insurance carriers must be properly admitted as required by applicable law. In the event Seller's insurance policy(ies) provide greater coverage and/or greater limits than the minimum requirements set forth herein, then the District and any other additional insureds shall be entitled to the full coverage and limits of such policy(ies), and these insurance requirements will be deemed to require such greater coverage and/or greater limits.

The required insurance will cover Seller, its authorized representatives, employees, agents and any other person (including its authorized representatives, employees and agents) performing any services under any contract or agreement with Seller. Except with respect to the workers' compensation and professional liability insurance, Seller shall name the District as an additional insured on all required insurance using Additional Insured Endorsement ISO Form CG 20 10 11 85 or if not available, ISO Forms CG 20 10 10 01 and CG 20 37 10 01 or if not available, their equivalent acceptable to District. The required insurance will be primary to and will seek no contribution from any insurance or self-insurance maintained by District or any other additional insureds.

Seller for itself and on behalf of its insurers, to the full extent permitted by law without voiding the insurance required under the Contract, hereby waives fully for the benefit of District and any other additional insureds any rights and/or claims which might give rise to a right of subrogation in favor of any insurance carrier issuing the required insurance or any other insurance (including any first party coverage) maintained by Seller. Seller will obtain a waiver of any subrogation right that its insurers may acquire against the additional insureds by virtue of payment of any such loss covered by such insurance.

Concurrently with the execution of the Contract, Seller will file with District original certificates of insurance and all endorsements showing the required insurance to be in force. These policies, whether by endorsement or otherwise, shall contain provisions that at least thirty (30) calendar days advanced written notice by mail shall be given the District of any cancellation, intent not to renew, or any policy change that would result in a reduction in the policies' coverages. The acceptance by the District of any certificate of insurance pursuant to the terms of the Contract evidencing the insurance coverages and limits required hereunder does not constitute approval or agreement by the District that the insurance requirements have been met or that the insurance policies shown on the certificates of insurance are in compliance with the requirements of the Contract. The certificates of insurance shall show the District as the certificate holder. Upon demand by District, Seller shall deliver to District certified true and correct copies of any and all insurance policies required to be maintained by Seller hereunder.

ARTICLE VI – FINANCIAL MATTERS

SECTION 1. FISCAL YEAR. The fiscal year of the District shall begin on October 1 of each year and end on September 30 of the following year.

SECTION 2. EXECUTION OF CHECK AND DOCUMENTS. The President, Vice President, and Treasurer are authorized to execute checks and documents on behalf of the District. Any disbursement of funds, except funds expended from the petty cash fund, shall be by check or draft signed by any two (2) of the officers designated in this section.

SECTION 3. PETTY CASH. A petty cash fund may be created upon approval of the Board of Trustees, which shall approve procedures for the expending of money from the petty cash fund.

SECTION 4. PAYMENT AUTHORIZATION REQUIREMENTS. Unless an exception in Paragraphs (a) through (d) below applies, all payments of District funds must be approved by a majority vote of the Board of Trustees and three competitive bids must be solicited prior to consideration by the Board. All expenditures of District funds that are required by statute to include a competitive bidding process shall be accomplished in the manner required by statute.

- a) Expenditures of ~~\$2,000~~ (increase to \$4,000) or less that are included in the approved budget may be paid at the discretion of the Chairman of the appropriate committee (add: or President) without competitive bids and without further approval

of the Board of Trustees. This paragraph does not apply to expenditures paid from the Debt Service Fund.

- b) Expenditures in excess of ~~\$2,000~~ (increase to \$4,000) but no more than ~~\$4,000~~ (increase to \$8,000) that are included in the approved budget may be paid without competitive bids, but must be approved by the Board of Trustees. This paragraph does not apply to expenditures paid from the Debt Service Fund or the Capital Improvements Fund.
- c) All scheduled debt service payments that are included in the approved budget may be paid at the discretion of the President, Vice President, or Treasurer without further approval of the Board of Trustees. Any non-scheduled pre-payments of debt service require approval of a majority vote of the Board of Trustees.
- d) Emergency repair work may be authorized by any Trustee, up to a limit of ~~\$5,000~~ (board discussion-determine amount) per occurrence. Emergency repair work that will cost more than ~~\$5,000~~(board discussion-determine amount) shall be approved by a majority vote of the Board, meeting in regular or special session. Emergency repair work is defined as expenditures that are necessary to remedy an immediate threat to public safety or those that are necessary to avoid closure of any District facility or significant amenity of a District facility. Damages that may be remedied by a partial closure of a portion of a facility that does not significantly affect the overall service provided by that facility do not qualify as emergency repair work.

At any time, the Board of Trustees by a majority vote at a regular or special meeting may temporarily suspend any of the exemptions provided for under Paragraphs (a)

through (d) from the general provisions of Section 4 as they relate to a specific expenditure. Such a temporary suspension must specifically state the intended expenditure to be suspended from the exemptions and the time period of the suspension, not to exceed 90 days. Suspensions of exemptions may be renewed after expiration by a majority vote of the Board of Trustees.

ARTICLE VII – BYLAWS

SECTION 1. AUTHORITY. These Bylaws are adopted pursuant to the authority of Ch. 99-418, Laws of Florida sections 7(4), (5) and (30), and other applicable law, and supersede any previously adopted Bylaws of the District.

SECTION 2. AMENDMENT OF BYLAWS. The Board of Trustees may alter or amend these Bylaws at any regular meeting, provided the text of any proposed amendment to the Bylaws shall have been published and placed on the agenda of at least one (1) prior regular meeting.

ADOPTED as the Bylaws of the CARROLLWOOD RECREATION DISTRICT
at the regular meeting of the Board of Trustees held ~~October 14, 2013~~ (June 12, 2023).

By: ~~Mickey Jaap~~ (Mark Snellgrove)

Name: ~~Michael J. "Mickey" Jaap~~ (Mark
Snellgrove)

Secretary: Joseph Costa



6109 Anderson Road Tampa, Florida 33634 (813) 520-5325 aderagroupinc@gmail.com

This agreement is hereby made and entered into this 20th of March 2023, by and between **Original Carrollwood**, located at **3515 Mcfarland Road Tampa FL 33618** hereafter called Owner, and **Adera Construction Group Inc., 6109 N. Anderson Road, Tampa, FL 33634**, hereafter called Contractor. The Contractor agrees to construct in a good and professional manner the improvements described herein, sometimes referred to as the "Project". Said improvements are to be completed in accordance with both the listed scope of work and approval and agreement of both the Owner and Contractor. The Contractor agrees to provide all the materials and labor required to perform the scope of work listed below:

Gutter System Installation

Gutter System

- Installation of 7" Gutter system on rear of the Recreation Center as requested.
- Gutters to be white in color
- Installation of 4"x5" downspouts needed to redirect water and reduce land erosion
- Install of Leaf guard to 7" gutters

Total: \$6,770.00

- 1) All changes and deviations in the work ordered by the Owner must be in writing, the contract sum being increased or decreased accordingly by the Contractor. Any claims for increases in the cost of the work must be presented by the Contractor to the Owner in writing, and written approval of the Owner shall be obtained by the Contractor before proceeding with the ordered change or revision.
 - 2) In the event the contractor is delayed in the prosecution of the work by acts of God, fire, flood, or any other unavoidable casualties; or by labor strikes, late delivery of materials; or by neglect of the Owner; the time for completion of the work shall be extended for the same period as the delay occasioned by any of the aforementioned causes.
 - 3) The Contractor agrees to maintain insurance at all times.
 - 4) This agreement shall be interpreted under the laws of the State of Florida.
 - 5) Attorney's fees and court costs shall be paid by the defendant in the event that judgment must be, and is, obtained to enforce this agreement or any breach thereof.
 - 6) Omissions in the Contract Documents and any work requested in variance to the Contract Documents are considered extra to the Contract and are not included in the Contract Price. Any additional work, due to site conditions known or not known to the Owner and not disclosed to the Contractor, or which could not be reasonably anticipated by the Contractor are not included in the Contract Price and shall be extra to the Contract Price.
 - 7) Prices are subject to change based on material type and quantity.
 - 8) The Owner hereby agrees to pay the Contractor for the materials and labor described above. The payment structure will be as follows 50% initial deposit and the remaining balance upon completion.
 - 9) We hereby warrant and guarantee the work at above reference location, in its entirety as defined in the construction documents for a period of one (1) year from the date of substantial completion. The undersign will repair or replace to the owner any or all work that may prove defective in workmanship within the guarantee period. This guarantee does not cover ordinary wear and tear, and unusual abuse or neglect of the property.
- IN WITNESS WHEREOF, the parties have indicated their acceptance of the terms of this Agreement by their signatures below on the dates indicated.

By: Owner _____ Date _____

Adera Construction Group, LLC

BY: _____ Date _____
Joe Ferraro, Principal



6109 Anderson Road Tampa, Florida 33634 (813) 520-5325 aderagroupinc@gmail.com

This agreement is hereby made and entered into this 20th of March 2023, by and between **Original Carrollwood**, located at **3515 Mcfarland Road Tampa FL 33618** hereafter called Owner, and **Adera Construction Group Inc., 6109 N. Anderson Road, Tampa, FL 33634**, hereafter called Contractor. The Contractor agrees to construct in a good and professional manner the improvements described herein, sometimes referred to as the "Project". Said improvements are to be completed in accordance with both the listed scope of work and approval and agreement of both the Owner and Contractor. The Contractor agrees to provide all the materials and labor required to perform the scope of work listed below:

French Drain System Installation

French Drain System

- Demo Concrete in front of 3 designated columns where downspouts are located on rear
- Create 3 trenches needed for French drain system
- Install French drain and tie into downspouts
- Infill concrete near columns

Total: \$5,800.00

- 1) All changes and deviations in the work ordered by the Owner must be in writing, the contract sum being increased or decreased accordingly by the Contractor. Any claims for increases in the cost of the work must be presented by the Contractor to the Owner in writing, and written approval of the Owner shall be obtained by the Contractor before proceeding with the ordered change or revision.
 - 2) In the event the contractor is delayed in the prosecution of the work by acts of God, fire, flood, or any other unavoidable casualties; or by labor strikes, late delivery of materials; or by neglect of the Owner; the time for completion of the work shall be extended for the same period as the delay occasioned by any of the aforementioned causes.
 - 3) The Contractor agrees to maintain insurance at all times.
 - 4) This agreement shall be interpreted under the laws of the State of Florida.
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 - 6) Omissions in the Contract Documents and any work requested in variance to the Contract Documents are considered extra to the Contract and are not included in the Contract Price. Any additional work, due to site conditions known or not known to the Owner and not disclosed to the Contractor, or which could not be reasonably anticipated by the Contractor are not included in the Contract Price and shall be extra to the Contract Price.
 - 7) Prices are subject to change based on material type and quantity.
 - 8) The Owner hereby agrees to pay the Contractor for the materials and labor described above. The payment structure will be as follows 50% initial deposit and the remaining balance upon completion.
 - 9) We hereby warrant and guarantee the work at above reference location, in its entirety as defined in the construction documents for a period of one (1) year from the date of substantial completion. The undersign will repair or replace to the owner any or all work that may prove defective in workmanship within the guarantee period. This guarantee does not cover ordinary wear and tear, and unusual abuse or neglect of the property.
- IN WITNESS WHEREOF, the parties have indicated their acceptance of the terms of this Agreement by their signatures below on the dates indicated.

By: Owner _____ Date _____

Adera Construction Group, LLC

BY: _____ Date _____
Joe Ferraro, Principal



MJ Gutters Inc.

(813) 704-6797

4013 Gallagher Rd.
DOVER, FL 33527

SAC-09856 / C-11436

Website: mjpguttersinc.com

Email: mjpguttersinc@gmail.com

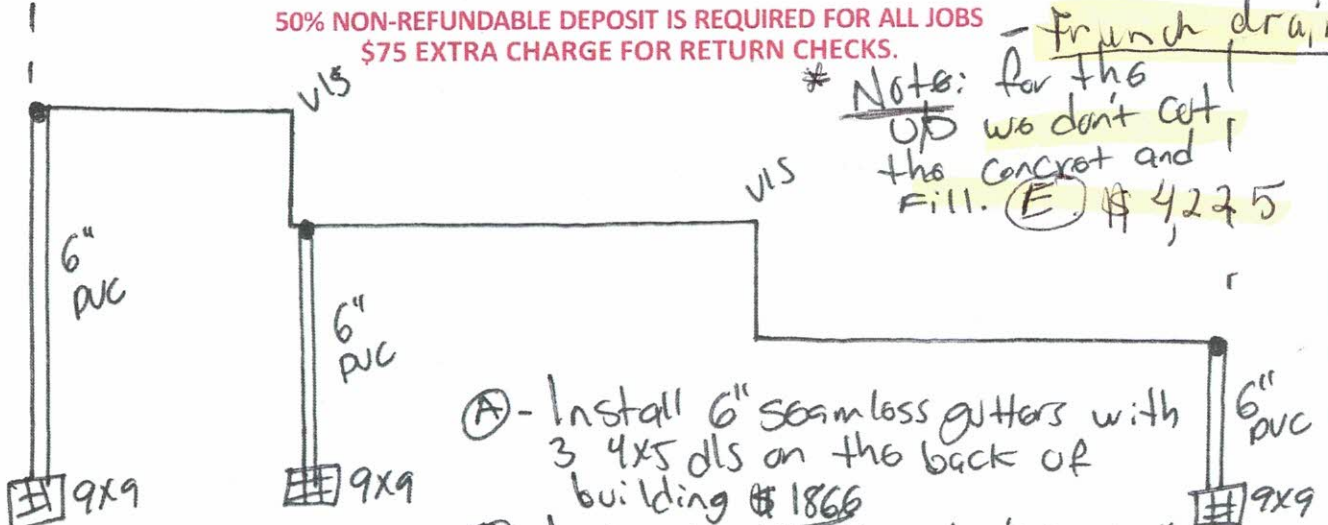
SPECIALIZING IN CUSTOM SEAMLESS GUTTERS.

This proposal is subject to withdraw if not accepted after 30 days.

Customer Name: Carrollwood Recreation District		Phone: HP O CP O: (Janet) (813) 932-1257	<input type="checkbox"/> Gutter <input type="checkbox"/> No Gutter <input type="checkbox"/> VS Valley Shield	<input checked="" type="checkbox"/> DownSpout <input type="checkbox"/> SB Splash Block <input type="checkbox"/> OE Open Ended
Address: 3515 McFarland Rd		Install Date:		
City and Zip Code: Tampa FL 33618		Email: offices@originalcarrollwoodCRD.com		
Story: T911	Roof Type: Metal Tile	Job Completion Date & Crew:		
Install 6"/7" Sherwood Green Color Seamless Aluminum GUTTERS		Install 4x5 Sherwood Green Color Downspouts		

ONE YEAR FULL WORKMANSHIP WARRANTY ON NEW INSTALLATION 20-50 YEAR MANUFACTURER'S WARRANTY ON ALUMINUM MATERIALS

50% NON-REFUNDABLE DEPOSIT IS REQUIRED FOR ALL JOBS
\$75 EXTRA CHARGE FOR RETURN CHECKS.



** Note: for the french drain we don't cut the concrete and fill. (E) \$4,225*

- (A) - Install 6" seamless gutters with 3 4x5 dls on the back of building \$1866
- (B) - Install leaf guard protection on 6" gutter \$1128
- * (C) - Install 7" seamless gutters with 3xu dls on the back of building. \$3082

- (D) - Install progard leaf guard protection on 7" gutter \$1504
- * (E) - Install 6" pvc old on the back of building and connect 3dls with 3 9x9 collection box \$4225

TOTAL	\$ _____
DEPOSIT / DATE	\$ _____ CHECK # _____
BALANCE DUE	\$ _____
Date: _____	Or Credit Card 3% Processing Fee

Job Satisfactory & Date: French drain

Terms and Conditions: Any alterations, deviation, or upgrades from above specifications shall be written agreement and will become an extra charge over and above the written estimate. MJ Gutters Inc. assumes no responsibility for landscaping, scheduling conflicts with other contractors, pool equipment, or anything not directly listed above proposal. The customer also authorizes MJ Gutters Inc. permission to work on the property and take before and after photos of all finished and unfinished work, and until the job is complete and paid in full. You authorize MJ Gutters Inc. to upload pictures and videos on social media and MJ Gutters Inc. website. Above prices, specifications, materials, and conditions are satisfactory, and I hereby grant MJ Gutters Inc. permission to perform the services specified. Payment for work will be made as outlined in the above payment agreement. MJ Gutters Inc. and the above reference customer agree that this contract is enforceable according to the laws of the State of Florida. Refusal to remit constitutes willful disregard for this contract this invalidating any expressed or implied warranties of further service. However, does not limit us from collection by whatever means necessary under the law and the customer would be responsible for all legal fees pertaining to such 3% plus collection fees up to 70% of balance will be added to unpaid invoices. Warranties are not applicable to vandalism, acts of nature, or lack expected maintenance by you, the customer. No warranty for work done until payment is made in full.

Warranty begins on date that works is completed. We are not responsible for broken roof tiles or for lifting shingles due to improper installation of drip edge. Gutters tend to hold small amounts of water.

If payment not received within 24 Hrs of completion of job, there will be a 5% added to the total

Acceptance of Proposal: The above pricing, specifications and conditions are satisfactory and are hereby accepted. You are authorizing MJ GUTTERS INC. representatives to do the work as specified. All work is C.O.D. Full payment is due upon completion of job.

Customer Signature: _____ Date: _____ MJ Gutters Representative: Jonas Date: 3/24/23

From: [mj gutters inc](#)
To: [Carrollwood Rec District](#)
Subject: RE: Revised proposal with the underground drainage
Date: Thursday, April 13, 2023 1:30:56 PM

Hello Janet,

No that is not micromesh the price for micromesh will be \$3760, the person that assisted Jonas when he went to do the estimate told him you guys didn't want micromesh.

Have a nice day!

Maria Leyva

Mj Gutters Inc
O:813-704-6797
Office hours
M-F 9am-3pm
Website: Mjguttersinc.com
Instagram/Facebook Mj Gutters Inc

From: [Carrollwood Rec District](#)
Sent: Thursday, April 13, 2023 11:42 AM
To: [mj gutters inc](#)
Cc: 'Yahoo!'; [Anna Brown](#)
Subject: RE: Revised proposal with the underground drainage

Hello there! Thank you for your time with the gutter and French drain quote. The board is almost ready to decide on this and they have one question please.

On your bid you quoted a leaf guard for the 7" gutters. Is that a micro mesh leaf guard? If not, what would you quote for a micro mesh guard please.

We look forward to hearing from you soon!



**ORIGINAL
CARROLLWOOD**
CHARM ON EVERY CORNER

Thank you,
Janet Bourland
Carrollwood Recreation District
3515 McFarland Road
Tampa, Florida 33618



Designer GUTTER COMPANY



STATE REGISTERED RX0062466 ALUMINUM SPECIALTY CONTRACTOR
LICENSED AND INSURED C5400

"Since 1986"

Pinellas/Pasco 727-786-1688
Hillsborough 813-855-9900

www.DesignerGutterCo.com

Mailing:

PO Box 30, Oldsmar, FL 34677

Email:

designergutter@gmail.com

DESIGN PROPOSAL

Date: 3-14-23 Design Consultant: Andy

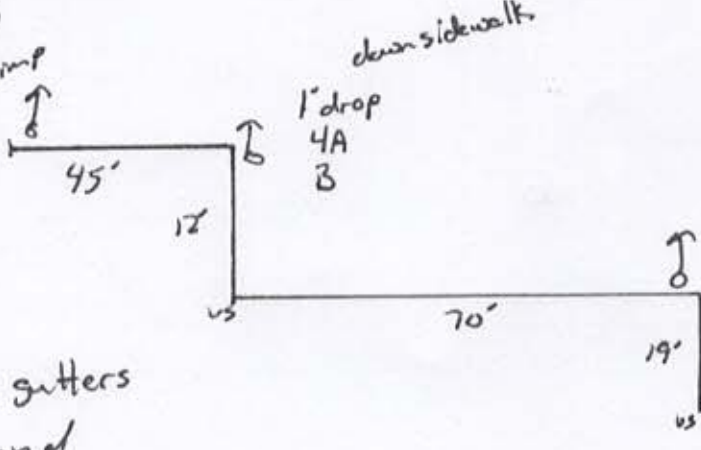
Customer <i>Carrollwood Recreational Center (Janet)</i>	Telephone <i>813-932-1257</i>	Telephone
Address <i>3515 McFarland Rd</i>	Email <i>office@originalcarrollwooderd.com</i>	
City <i>Carrollwood</i>	Zip <i>33618</i>	Roof Surface/ Height of Install
Warranty <small>Designer Gutter Company offers a warranty on all products installed for 1 full year. All materials come with a 20/50 year warranty from the manufacturer. Warranties only cover issues due to craftsmanship, and exclude: acts of nature, vandalism, lack of maintenance, or anyone other than Designer Gutter Company personnel tampering with the gutter system (i.e. roofer or handyman). Designer Gutter Company is not responsible for prior existing issues with a roof, poorly installed drip edge, rotten wood, or damages involved with removing old gutter systems. Gutters holding small amounts of water is normal. The warranty begins the date of the installation, but does not go into effect until paid in full. All our installations meet or exceed all required building codes, VA & FHA requirements.</small>		<input checked="" type="checkbox"/> SHINGLE <input type="checkbox"/> FLAT <input type="checkbox"/> BARREL TILE <input type="checkbox"/> NON-WALKABLE <input type="checkbox"/> TILE <input type="checkbox"/> METAL <input checked="" type="checkbox"/> ONE STORY <input type="checkbox"/> 2ND STORY <input type="checkbox"/> 3RD STORY
Legend — New Gutter ○ Down Spout VS Valley Shield No Gutter □ Splash Block		

- Install new 6" seamless gutters w/custom cut miters and 3x4 spouts using hidden hangers

Spring discount -10%
 \$2800.00
 \$2520.00

In small corner of brick
 1' drop
 2A
 4-2 crimp
 A

Tennis courts



In small corner of brick
 1' drop
 2A
 4-2 crimp
 A

1' drop
 2B
 2-4 crimp
 A

- Install new 7" seamless gutters w/custom cut miters and 4x5 downspouts using hidden hangers.

Spring discount -10%
 \$4675.00
 \$4200.00

* Please See leafguard options *

GUTTER	6"	7" color Sherwood green
DOWNSPOUT	3X4	4X5color Classic cream

ACCEPTANCE **X** _____ Contract

DATE _____

PROPOSAL EXPIRES IN 30 DAYS

CASH or CHECK → \$


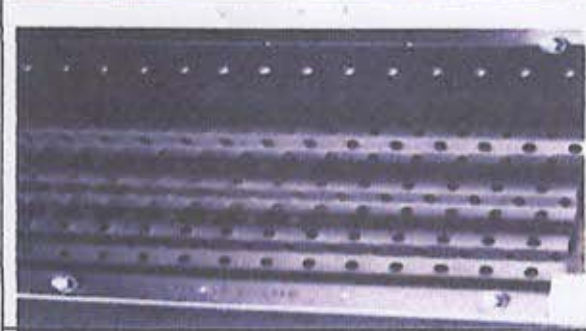
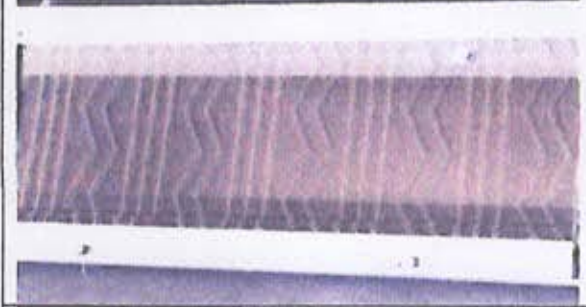

All Work is Required to be C.O.D. at time of installation



Designer GUTTER COMPANY

Leaf Protection Options

All our leaf guard systems are installed in 4-6' panels and are secured in the gutter using a j-channel (rather than shoving them under the shingles which will VOID your roofer's warranty) are then secured using non-corrosive zinc screws. No matter what any salesman tries to tell you, there is no such thing as "maintenance free" leaf protection. We have been in business since 1986, and these are the best options we feel are available for the right circumstances.

	<p>This is our STANDARD leaf guard. It is the cheapest option we have. It is a good option for people that have underground drains or just want to keep things like a ball or animals out of their gutter. This option would need a lot of maintenance if used in a heavily wooded area. This option would be \$_____ extra</p>	<p>6" \$1155⁰⁰ 7" \$1312⁰⁰</p>
	<p>The PINHOLE leaf protection system is our most popular leaf protection that we offer. This is a great system designed of sturdy aluminum and features pinholes on a wavy surface to not only trap water, but to allow air to potentially blow leaves off the gutter system. If you're looking for a solid system with moderate to heavy bigger leaves like oak or maple, this is a great option. This option would be \$_____ extra</p>	<p>6" \$1312⁰⁰ 7" \$1496⁰⁰</p>
	<p>This option is called Leaf Blaster. It is constructed of a stainless-steel mesh with very sturdy aluminum frame. This is extremely comparable to what other bigger franchise companies offer, but at a much more reasonable price. This is a great option for pine needles and other fine or smaller debris. This option would be \$_____ extra</p>	<p>6" \$1640⁰⁰ 7" \$1804⁰⁰</p>
	<p>This is the Micro Mesh leaf protection system. It is the heaviest duty and solid leaf protection system available. It features a stainless mesh with very sturdy aluminum housing. The slotted panel under the micro mesh helps with extreme downpours. This option would be \$_____ extra</p>	<p>6" \$1968⁰⁰ 7" \$2132⁰⁰</p>

ESTIMATE

Hannigan Painting, Inc

Genoa Lane
Land O Lakes, Fl
Phone 813-994-6430

Carrollwood Recreation District

3515 McFarland Rd

DATE: April 15, 2023

DESCRIPTION	AMOUNT
Interior: Recreation Room Tray Ceiling, Border and Walls Kitchen (Not Storage Room or Trim - window frame doors or frames) Lobby Walls and Stone Trim above Brick Wall Office Walls (Not Storage room) 2 Bathrooms (Walls Only) Small Meeting Room (Walls Only) No Storage Rooms or Trim (window and doors)	
Paint and Labor =	\$5,500.00

THANK YOU FOR THIS OPPORTUNITY TO BID

ESTIMATE



Prepared For

Carrollwood Center- Attention Janet
3515 McFarland Rd
Tampa, Fl 33618
(813) 932-1257

Darrey Painting

11803 Vera Ave
Tampa, Fl 33618
Phone: (813) 323-2017
Email: stevedarrey@msn.com

Estimate # 545
Date 04/21/2023

Description

Total

Interior Repaint	\$7,885.00
------------------	------------

Large Room- paint walls and tray ceilings

Kitchen-walls

Lobby- walls and concrete ledge

Woman's bath- walls

Men's bath- walls

Small room- walls

Final quote total includes Labor and Materials

*All wall discrepancies to be scraped, mudded, and primed prior to being painted

**Job to be done all by hand with rollers and brushes to avoid any overspray inside

*** Any unforeseen problems with be discussed with the board before any final decisions are made

**5-7 day completion

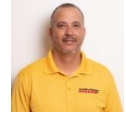
Date originally given 6/20/2022

JOB SITE

Carrollwood Recreation District
3515 McFarland Road
Tampa, FL 33618
(813) 932-1257
office@originalcarrollwoodCRD.com

PREPARED BY

Jay Grechika
Franchise Owner
813-241-7143
jgrechika@certapro.com



CLIENT

Carrollwood Recreation District
3515 McFarland Road
Tampa, FL 33618
(813) 932-1257
office@originalcarrollwoodCRD.com

CLIENT CONTACTS

PRICING:

Base Price:	\$5,610.00
Subtotal:	\$5,610.00
Total:	\$5,610.00
Balance	\$5,610.00

GENERAL SCOPE OF WORK

CERTAPRO PAINTERS WILL COVER AND PROTECT ALL NON PAINTED SURFACES

PLEASE REMOVE ALL SMALL FRAGILE OBJECTS AND WALLHANGINGS PRIOR TO PAINTING

CERTAPRO PAINTERS WILL MOVE FURNITURE REQUIRED TO ACCESS PAINTABLE WALLS

THE INTERIOR PAINTING PROPOSAL IS FOR THE FOLLOWING

*LOBBY AND HALLWAY BATHROOMS-CONCRETE TRIM RIGHT WALL INCLUDED IN PROPOSAL

*OFFICE- WALLS ONLY - STORAGE CLOSET EXCLUDED FROM PROPOSAL

*LARGE REC ROOM- WALLS AND GREEN TRAY CEILING ONLY

*MENS & WOMENS BATHROOM - WALLS ONLY

*SMALL MEETING ROOM- WALLS ONLY

SHERWIN WILLIAMS DURATION HOME SATIN WALLS

SHERWIN WILLIAMS SUPERPAINT FLAT TRAY CEILING TRIM LARGE REC ROOM

KITCHEN WALLS LISTED IN OPTIONS- NOT INCLUDED IN PROPOSAL PRICING

SURFACE PREPARATION

This default is empty.

SET-UP

This default is empty.

CLEAN UP

Daily: Ladders are taken down and stored in a designated area along with all other tools and supplies. All debris will be swept and removed from the property or deposited in the appropriate trash receptacle according to the customer's preference. Upon Completion: All tools, supplies & equipment will be removed from the property.

ADDENDUM - ALL PICTURES



NOTES

Thank you for allowing CertaPro the opportunity to provide you with a Proposal for your Project. We will communicate with you on a daily basis to update you on the progress of the project. Our goal from start to finish is to provide you with an "Excellent Painting Experience."

PLEASE CAREFULLY REVIEW ALL OF THE ITEMS, AREAS AND COMPONENTS THAT ARE INCLUDED AS WELL AS THOSE THAT ARE EXCLUDED TO ENSURE THAT THERE IS NO MISUNDERSTANDINGS AS TO THE SCOPE OF THE PROJECT. ANY ITEMS, AREAS, AND COMPONENTS NOT SPECIFICALLY INCLUDED ARE EXCLUDED.

This Proposal is for an Interior Painting Project. During your project you will be assigned a Job Site Supervisor (JSS). The JSS is on site to paint, run the painting crew and to be available to address any of your concerns throughout the project. Certapro will also provide a Project Manager to supervise and insure the project is being handled as promised and proceeding on schedule to your satisfaction.

The number of coats of paint are noted on the proposal and additional coats will be an additional charge.

At the end of the project we will fully clean up and then do a final walk through with you to inspect the work performed if you are available when the crew has finished their work and if necessary finish the final touch ups. CertaPro Painters at the end of your project is hoping to receive an excellent review from you when you evaluate our work. Through this rating we hope to earn the privilege of doing additional work and for you to recommend us to other businessmen, your family, friends and neighbors.

CertaPro complies with all local, state and federal laws; including but not limited to the EPA Lead-Safe program. If you suspect lead please notify us immediately. Paint is included in the cost of the project.

CUSTOMER SERVICE COMMITMENT: The goal for this job is to provide the best customer experience possible. This is accomplished by being friendly and courteous, by making the client feel part of the process with daily updates and excellent communication, by doing things right the first time, and by respecting your property and your home. We recognize that we are guests.

WE DONATE A PORTION OF ALL SALES TO THE LEUKEMIA & LYMPHOMA SOCIETY

WARRANTY ON ALL WORK: We warranty all our work for 2 years against blistering and peeling. This is not just a "handshake" warranty. This is a legal document; please see back of proposal for details. ***Please note that water damage and nail pops are structural issues, and are not painting related warranty issues***.

CertaPro Painters would be honored to be awarded your painting project!

This offer is valid for 60 days.

I wanted all of the paragraphs when ending to skip a line and yes there are certain areas that I wanted to have blue text. I am also having a problem with the choices on the exclusion section are not printing up on our proposals despite them being entered on the defaults. The exclusion choices also do not have boxes that you could check but the exclusions that I do have entered are not printing on the proposal.

ADDITIONAL NOTES

PICKING YOUR COLORS

To pick your colors, please go to the nearest Sherwin Williams paint store. We will need the color name, color number, and sheen that you would like us to use. Color choices should be given to CertaPro no later than 5 days before your projects start date to avoid delays.

ACCENT WALLS:

If a customer decides to add an accent wall anytime after receipt of this proposal, an extra fee of \$150 per Accent Wall will be added to the total, due to the additional labor and materials required.

EXTRACOLORS: There will be an additional \$75 per wall color above 5 selections.

*The cost for additional work will need to be approved and signed off by Customer prior to starting *

PAYMENT METHODS:

We accept checks and credit cards. The credit cards we accept are Visa, American Express, Discover & MasterCard.

If paying with check, please provide check made out to CertaPro Painters to the Job Site Supervisor assigned to your project. If paying by credit card, please contact our office at 813-936-9242

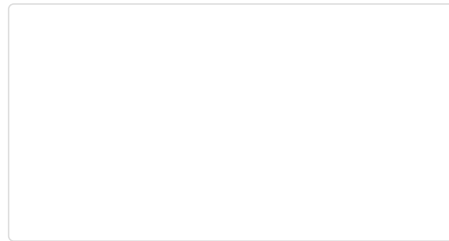
SIGNATURES



04/17/2023

CertaPro Painters Authorized Signature

Date



Authorized Client Signature

Date

Authorized Client Representative Name & Title

Client

PAYMENT DETAILS

Payment is due: In full upon job completion

OPTIONAL WORK

The following items are **NOT INCLUDED** in your project but may be added for the additional cost listed below.

Item	Description	Price
Kitchen Walls		\$475.00

COMMERCIAL DEFINITIONS AND CONDITIONS OF THIS CONTRACT

RELATIONSHIP — The individual giving you this proposal is an independent contractor licensed by CertaPro Painters® to use its systems and trademarks to operate a painting franchise. The work will be completed by the independent franchised contractor. Please make any check payable to the franchise shown on the front of this proposal.

COLORS — Colors may be chosen by the client prior to commencement of work. If, after the job starts, a color change is required, the independent Contractor will have to charge for time and material expenses incurred on the original color.

UNFORESEEN CONDITIONS — Should conditions arise which could not be determined by visual inspection prior to starting work, the client must pay an agreed upon extra for the completion of such work.

PROPOSAL — This proposal is valid for 60 days after it was written. In addition, the Independent Franchised Contractor should be informed of your desire to have the work done and receive a signed copy of the proposal before work is to be started.

ATTENTION CLIENT:

YOU, THE BUYER, MAY CANCEL THIS TRANSACTION AT ANY TIME PRIOR TO MIDNIGHT OF THE THIRD BUSINESS DAY AFTER THE DATE OF THIS TRANSACTION. SEE THE BELOW NOTICE OF CANCELLATION FOR AN EXPLANATION OF THIS RIGHT. (SATURDAY IS A LEGAL BUSINESS DAY IN CONNECTICUT.) THIS SALE IS SUBJECT TO THE PROVISIONS OF THE HOME SOLICITATION SALES ACT AND THE HOME IMPROVEMENT ACT. THIS INSTRUMENT IS NOT NEGOTIABLE.

NOTICE OF CANCELLATION

YOU MAY CANCEL THIS TRANSACTION, WITHOUT ANY PENALTY OR OBLIGATION, WITHIN THREE BUSINESS DAYS FROM THE ABOVE DATE. IF YOU CANCEL, ANY PROPERTY TRADED IN, ANY PAYMENTS MADE BY YOU UNDER THE CONTRACT OR SALE, AND ANY NEGOTIABLE INSTRUMENT EXECUTED BY YOU WILL BE RETURNED WITHIN TEN BUSINESS DAYS FOLLOWING RECEIPT BY THE SELLER OF YOUR CANCELLATION NOTICE, AND ANY SECURITY INTEREST ARISING OUT OF THE TRANSACTION WILL BE CANCELLED. IF YOU CANCEL, YOU MUST MAKE AVAILABLE TO THE SELLER AT YOUR RESIDENCE IN SUBSTANTIALLY AS GOOD CONDITION AS WHEN RECEIVED, ANY GOODS DELIVERED TO YOU UNDER THIS CONTRACT OR SALE, OR YOU MAY, IF YOU WISH, COMPLY WITH THE INSTRUCTIONS OF THE SELLER REGARDING THE RETURN SHIPMENT OF THE GOODS AT THE SELLER'S EXPENSE AND RISK. IF YOU DO MAKE THE GOODS AVAILABLE TO THE SELLER AND THE SELLER DOES NOT PICK THEM UP WITHIN TWENTY DAYS OF THE DATE OF CANCELLATION, YOU MAY RETAIN OR DISPOSE OF THE GOODS WITHOUT ANY FURTHER OBLIGATION. IF YOU FAIL TO MAKE THE GOODS AVAILABLE TO THE SELLER, OR IF YOU AGREED TO RETURN THE GOODS AND FAIL TO DO SO, THEN YOU REMAIN LIABLE FOR PERFORMANCE OF ALL OBLIGATIONS UNDER THE CONTRACT. TO CANCEL THIS TRANSACTION, MAIL OR DELIVER A SIGNED AND DATED COPY OF THIS CANCELLATION NOTICE OR ANY OTHER WRITTEN NOTICE, OR SEND A TELEGRAM TO:

Name of Seller **Jay Grechika**

DATE OF TRANSACTION _____

NOT LATER THAN MIDNIGHT OF _____

I HEREBY CANCEL THIS TRANSACTION

(Buyer's Signature)

(Date)

LIMITED TWO YEAR WARRANTY

Subject to the limitation set forth below, for a period of 24 months from the date of completion of the work described on the front of this contract, the Independent Franchise Owner named on the front of this contract (the "Contractor") will repair peeling, blistering or chipping paint resulting from defective workmanship.

THIS LIMITED WARRANTY DOES NOT COVER:

- Any work where the Contractor did not supply the paint or other materials.
- Any work which was not performed by the Contractor.
- Varnished surfaces.
- Surfaces made of, or containing, galvanized metal.
- The cost of paint required to perform the repairs.
- Repairs to horizontal surfaces or any surface that, by virtue of its design permits moisture to collect. Surfaces include, but are not limited to, decks, railings, stairs, porches, roofs and wood gutters.
- Exact paint match as environmental conditions will affect the color and finish of all paints over time.
- Any repairs which are necessitated as a result of a defect in the paint regardless of whether the paint was supplied by the Contractor or the customer.
- Bleeding caused by knots, rust or cedar.
- Cracks in drywall, plaster or wood.
- Peeling, blistering or chipping where they are caused by:
 - mill-glazing from smooth cedar
 - ordinary wear and tear.
 - abnormal use or misuse.
 - peeling of layers of paint existing prior to the work performed by the Contractor.
 - structural defects.
 - settling or movement.
 - moisture content of the substrate.

- abrasion, mechanical damage, abrasive cleaning, abuse or damage resulting from use of chemicals or cleaning agents or exposure to harmful solids, liquids or gases.
- damage or defects caused in whole or in part by reason of fire, explosion, flood, acts of God, extreme weather conditions, misuse, alteration, abuse, vandalism, negligence, or any other similar causes beyond the control of the Contractor.

Repairs under this limited warranty will be performed only on the specific areas where peeling, blistering or chipping has occurred and only to the level of surface preparation described in the preparation section of the Contract.

FOR THIS WARRANTY TO BE VALID, YOU MUST:

- Pay the full contract price.
- Retain a copy of the original contract.
- Retain a copy of your cancelled check or other evidence of payment in full.
- Pay for all materials used to perform the repairs.
- Make the property accessible to the Contractor, or his employees, to perform the repairs.

THIS LIMITED WARRANTY IS THE ONLY EXPRESS WARRANTY MADE BY THE CONTRACTOR AND IS IN LIEU OF ALL OTHER WARRANTIES, EXPRESS OR IMPLIED. THIS WARRANTY COVERS ONLY THOSE SERVICES PROVIDED BY THE CONTRACTOR TO THE ORIGINAL PURCHASER NAMED ON THE FRONT OF THIS CONTRACT. IN NO EVENT SHALL THE CONTRACTOR BE LIABLE FOR INCIDENTAL OR CONSEQUENTIAL DAMAGES IN EXCESS OF THE ORIGINAL CONTRACT PRICE. THIS WARRANTY MAY NOT BE ALTERED OR EXTENDED FOR ANY PURPOSE UNLESS DONE SO IN WRITING IN A DOCUMENT EXECUTED BY ALL PARTIES TO THIS CONTRACT.

This warranty gives you specific legal rights. Some jurisdictions do not allow limitations on how long an implied warranty lasts, so the above limitation may not apply to you. Some jurisdictions do not allow the exclusion or limitation of incidental or consequential damages, so the above limitations or exclusions may not apply to you.

For warranty service, you should contact your Contractor to schedule an inspection of your property by calling CertaPro Painters® at 800.462.3782.

Subtotal	\$7,885.00
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Total	\$7,885.00
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By signing this document, the customer agrees to the services and conditions outlined in this document.



Innerflow Lawnsprinklers, Inc.
16605 Scheer Blvd Unit D
Hudson, FL 34667
Phone (727)484-4262
Email: gulfshoreexc@yahoo.com

4/10/2023
Estimate # 41023

Carrollwood Recreation District
3515 McFarland Rd
Tampa, FL 33618
Attn: Michael Carelli

Estimate for Carrollwood softball field 11708 Orange Grove Dr Carrollwood,
FL 33618. Deliver and grade 4 loads of clay and recap.
Total \$10,500.00

We appreciate your continued business and look forward to hearing from you.

Sincerely,

Larry Santangelo
President
Innerflow, Inc.



Reserve Study Proposal

April 20, 2023

Prepared for:

Original Carrollwood Tax District

Submitted to:

Chrissie Price
Community Development Chair
Original Carrollwood Tax District
3515 McFarland Road
Tampa, FL 33618
813-932-1257
cprice2097@gmail.com



Submitted by:

Global Solution Partners
info@GlobalReserveStudies.com
(844) 477-7883



Executive Summary

This proposal fee for a **Full Reserve Study with Site Visit** includes:

- Proposal delivery
- Meeting at the time of site evaluation
- Site evaluation
- Initial report delivery
- Access to our Funding Plan Scenario Calculator ([click for demo video](#))
- One report revision
- Final report delivery
- Participation in one board meeting via teleconference, upon request

The Reserve Study will comply with the following standards:

- Community Associations Institute (CAI) National Reserve Study Standards
- State regulations
- Site work performed by local Reserve Consultant
- Project overseen by a CAI Reserve Specialist
- Site evaluation promptly scheduled upon receipt of completed client questionnaire
- Initial report delivered within 30 days of receipt of completed client questionnaire

To learn more about Global Solution Partners or see a sample report visit:
globalsolutionpartners.com/communities/ • globalsolutionpartners.com/sample

Service Options

Option #1: Full Reserve Study with Site Visit for \$5,475.00. Payment is due in full upon delivery of the initial report. Includes access to the Scenario Calculator for 60 days.

Option #2: Clear Vision Package for a total of \$12,866.25. The Clear Vision Package includes three Reserve Studies, paid annually for three years. It consists of one Full Reserve Study with Site Visit + one Reserve Study Update without Site Visit + one Reserve Study Update with Site Visit = \$12,866.25, paid in three annual installments. Includes access to the Scenario Calculator for 60 days following each reserve study report.

\$6,433.13, is due on delivery of the Full Reserve Study initial report. \$3,216.56 is due on the first anniversary date, at which time a Reserve Study Update without Site Visit will be performed. \$3,216.56 is due on the second anniversary date, at which time a Reserve Study Update with Site visit will be performed. See the Fees section on page 9 for more detail.

Option #3: Ongoing Partnership Solution for a down payment of \$2,190.00 and monthly payments of \$237.25. The Ongoing Partnership Solution includes four Reserve Studies, paid monthly for five years. It consists of one Full Reserve Study with Site Visit + two Reserve Study Updates without Site Visits + one Reserve Study Updates with Site Visit = a total fee of \$16,425.00. Includes access to the Scenario Calculator for the five-year term.

A down payment of \$2,190.00 is due upon proposal acceptance. \$237.25 is due monthly for a five-year term. See the Fees section on page 9 for more detail.

Options #2 and #3 allow the association to spread out and budget for future study costs.

What is a Reserve Study?



A reserve study is used as a financial planning tool to assist in developing an organization's capital expense budget.

In order to preserve property values within a community, it is necessary to repair or replace major common-area components such as roofs, boilers, elevators, balconies, seawalls, asphalt surfaces and more.

This requires an organization to put aside or “reserve” funds for these future expenses. A properly developed reserve study offers a funding plan to be used in the annual budgeting process. The timeframe for projections made in the Reserve Study is called the “study period” and is typically 30 years.

Parts of a Reserve Study

- I. Physical analysis
 - Component Inventory
 - Estimated useful life expectancies
 - Estimated remaining useful life expectancies
- II. Financial Analysis
 - Estimated replacement costs
 - Current fund status
 - Funding plan

Types of Reserve Studies

- I. **Full Reserve Study with Site Visit** – This is a full Study with an on-site evaluation. It is performed if the property is new, if the previous study is deemed unreliable, or if the most recent study was not performed within the past 5 years.
- II. **Reserve Study Update with Site Visit** – This is an update to a previous reserve study, including an onsite evaluation. This is recommended to be performed approximately every two years after the Full Reserve Study.
- III. **Reserve Study Update without Site Visit** – This is an update to a previous reserve study without an onsite evaluation. It is recommended annually in those years that a reserve study with a site visit is not performed.

What is a Reserve Study?

I. **Legal, fiduciary, and financing requirements**

While many states have specific regulations regarding funding an organization's reserve accounts, all Boards of Directors have a fiduciary obligation which includes being responsible when it comes to financial planning for the association. Additionally, it is becoming commonplace for lenders and buyers to scrutinize reserve accounts.

II. **Maintain property values**

There is a strong correlation between how well a community is maintained and the property values within that community. Unfortunately, some communities are poorly maintained as a result of poor planning. A Reserve Study provides a financial road map to ensure there will be adequate funds to keep the community in good repair.

III. **Repair and replacement plan**

Most have heard the saying "If you fail to plan... then you plan to fail." A Reserve Study not only acts as a financial plan but also serves as a guide for scheduling needed future repairs and replacements.

IV. **Minimize the need for special assessments and loans**

Special assessments and loans are not terms that most owners want to hear and are frequently needed as a result of poor planning. The information in a Reserve Study allows for better planning and therefore will help avoid the need for special assessments or loans.

V. **Fairly distributes the contributions**

Funding the reserves at proper levels facilitates everyone, both current and future owners paying their fair share. While underfunding of the reserves is a disservice to future owners and overfunding of reserves is a disservice to current owners.

Who is Global Solution Partners?

The Global Solution Partners team has local expertise with a global vision and is committed to being your partner in finding customized solutions for your organization.

At the core of our very existence is the devotion to not merely satisfy our clients but to continually DELIGHT them and establish a mutually beneficial long-term relationship.

Here is what you can expect from us to accomplish this:



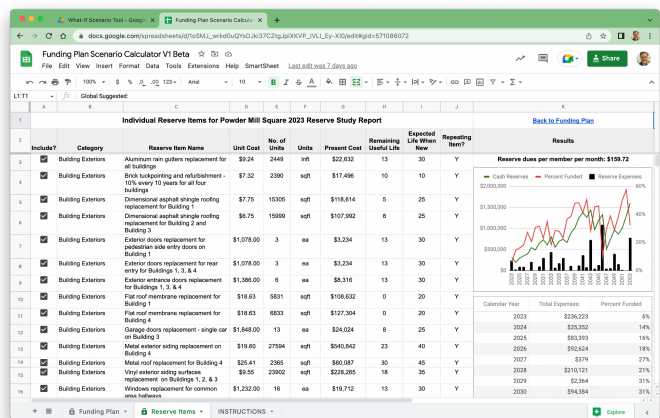
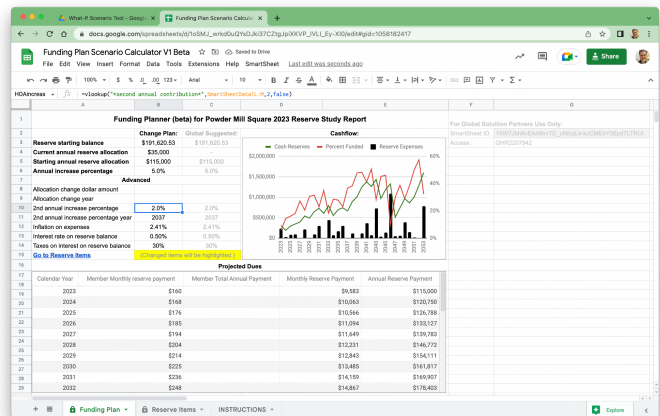
- **Experience.** On average, our team members have over 20 years of experience in the industry and hold many certifications and licenses including contracting, engineering, roofing, code inspection, real estate, project management, home inspection, pest control, etc.
- **Expertise.** All projects are overseen by a CAI certified Reserve Specialist.
- **Education.** We proactively seek out opportunities to continually educate our team members and our clients.
- **Customization.** No two communities are identical. We present customized solutions meeting the specific needs of your organization.
- **Collaborative.** For example, our Funding Plan Scenario Calculator allows board members and financial planners to run “what-if” scenarios on our suggested funding plans, enhancing the collaboration with our project managers on reserve study reports.
- **Responsiveness.** On average, we deliver the initial report within 30 days of receiving the completed client questionnaire.
- **Communication.** Clear and frequent communication is the key to any successful relationship.
- **Dedication.** Our team is “Dedicated to Delight” our clients without exception!
- **Fulfilling Needs.** Offering pertinent services for your organization. Such as Insurance Appraisals, Property Condition Assessments (PCAs), Transition Studies, etc.
- **Involvement.** Our team members play an active role in the development of the industry through their participation in leading organizations such as the Community Association Institute (CAI) and the American Resort Development Association (ARDA).

Funding Plan Scenario Calculator

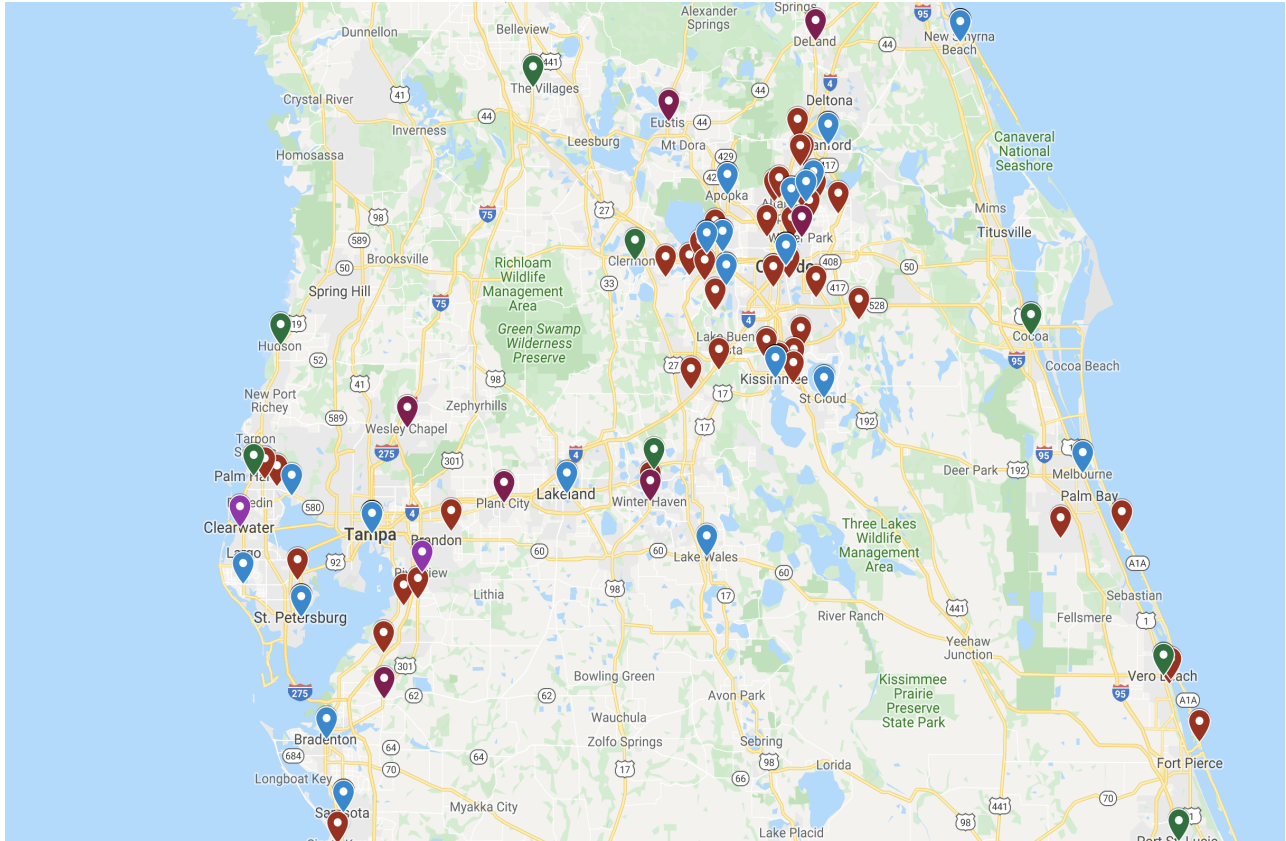


Each reserve study comes with access to our Funding Plan Scenario Calculator. The scenarios calculator is a proprietary online spreadsheet tool allowing board members and financial planners to run “what-if” scenarios on our suggested funding plans, enhancing the collaboration with our project managers to complete the final reserve study report.

- Enables board members to consider a variety of scenarios throughout the reserve budget process
- Forecasts the potential impact on the funding plan based on changes
- Make changes to the contribution level, annual increases, replacement costs, replacement timeframes, and more
- 24-7 access to “what-if” scenarios in real time, both on your own and during budget meetings
- Access included free of charge for 60 days during the report revision process
- Watch a [2-minute video demo](#) to see how it works!



Sampling of Communities Served Near You



Lake View Condominium No. 3 Association, Inc. - Orlando, FL

Hacienda Del Sol Condominium Association - Orlando, FL

Bearss Landing - Tampa, FL

Royal Manor Villas Homeowners Association Inc. - Orlando, FL

Pine Ridge Club Village I Condominium Association - Sanford, FL

Carrollwood Village Chase - Tampa, FL

Shingle Creek Reserve at The Oaks - Kissimmee, FL

Lakeview Village Condominium Association Number 12, Inc. - Orlando, FL

South Oaks Homeowners Association of Melbourne, Inc. - Melbourne, FL

Belmont at Park Central - Orlando, FL

Charles Towne at Park Central Condominium Association - Orlando, FL

Manor Row at Park Central Condominium Association - Orlando, Florida

Trafalgar Square - Tampa, FL

Lakewood Condo Association II - Naples, FL

Imperial Cove Condominium Association V Inc. - Clearwater, FL

Stonebridge Lakes Condo Association - Orlando, FL

Chandlers Forde Condominium Association - Sarasota, FL

Estuary at Grey Oaks - Naples, FL

La Fortuna - Kissimmee, FL

References

Brookmore Estates HOA - Oviedo, FL
Alejandro Sira - admin@jedimanagement.com
Jedi Management

Indigo Lakes - Naples, FL
Greg Sandora - gsandora@associagulfcoast.com
Associa Gulf

South Creek Owners Association - Osprey, FL
Genny Deck - ginny@pinnaclecam.com
Pinnacle Community Association Management

Sea Mist Court Condominium Association, Inc. - New Smyrna Beach, FL
Linda Armstrong - seawoods@cfl.rr.com
Sentry Management

New Triad Townhomes of Carrollwood - Tampa, FL
Susan Sheets - SSheets@creative-mgmt.com
Creative Management

ChampionsGate Communities - Championsgate, FL
NMorales@theiconteam.com - NMorales@theiconteam.com
ICON Management

Bearss Landing - Tampa, FL
Marty Burke - Marty@wcmanagement.info
Westcoast Management & Realty

Celestina Master Property Owners Association - St. Johns, FL
Aubrie Synan - asynan@vestapropertyservices.com
Vesta Property Services

Reflections on the River Condominium Association, Inc. - Sebastian, FL
Deanna Brown - deanna@archoice.com
AR Choice

Proposal Terms and Conditions

Proposal Date: April 20, 2023

Global Solution Partners is pleased to present the following Reserve Study proposal for Original Carrollwood Tax District.

I. Original Carrollwood Tax District Property Details

1. Number of dwelling units: 4 Budgets
2. Type of buildings within the community: Tax District Recreational Facilities
3. Property Location: 3515 McFarland Road, Tampa, FL 33618
4. Common unit exteriors included in the study: N/A
5. Sampling of common elements to be included in the study:
 - White Sands Beach Pavilion** -, Boat Ramp, Bathrooms - 11613 Carrollwood Drive
 - Original Carrollwood Park** - Sports field, Playground, Pavilion, Restrooms, Walking Path, Dog Park, Fencing - 11430 Orange Grove Drive
 - Scotty Cooper Park** - Park, Dock, Pavilion/ Restrooms - 10717 Carrollwood Dr.
 - Recreation Center** - Clubhouse, Tennis Courts - 3515 McFarland Road

II. What To Expect (once we receive the signed acceptance)

1. Within two business days you will receive a greeting with a link to a client questionnaire.
2. Once we receive the completed client questionnaire your dedicated Project Manager will promptly schedule a site evaluation. Please return the questionnaire within 3 business days of receiving. The projected report delivery is 30 days from receiving the completed client questionnaire.
3. Our Site Specialist will conduct a site evaluation. It is preferred but not always mandatory that a client representative attends the site evaluation.
4. The Project Manager will compile all of the information, and create a customized funding plan.
5. The Project Manager will deliver the initial report typically within 30 days of receiving the completed client questionnaire. At this time, payment in full is due.
6. The Client has 60 days to review and submit questions, comments, and suggested edits to the report.
7. During this time the client will have access to our proprietary Funding Plan Scenario Calculator. This will allow the client to alter the funding plan assumptions and reserve items and see how that will affect the long term community cashflow.
8. The Project Manager will collaborate with the Client on potential edits to the report. If needed, revisions to the initial report are typically completed within 2 weeks of receiving confirmation from the Client of specific changes. There is no additional fee for revising the report the one time.

III. Scope of Services

This Study will be in compliance with the Community Associations Institute (CAI) National Reserve Study Standards, as well as any applicable state guidelines. This study is designed to

Proposal Terms and Conditions

assist the Client in developing a capital expense budget for the repair or replacement of listed components for the subject property.

The onsite evaluation will include the following:

1. Meeting with client representative (if desired)
2. Creation of component inventory list (in collaboration with the Client)
3. Determining quantities and measurements of components on the inventory list
4. Establishing an estimated useful life expectancy for each component
5. Establishing an estimated remaining life expectancy for each component based on its current condition

The offsite report generation process will include the following:

1. Continued collaboration with the Client to ensure the most accurate customized report
2. Review of documentation (e.g. CC&Rs, building plans, site plans, maintenance plans, previous studies) provided by the Client
3. Review of the reserve account information provided by the Client
4. Compilation of component inventory list information
5. Development of a customized funding plan
6. Delivery of initial report to the Client
7. Access to our Scenario Calculator for 60 days
8. Appropriate revisions (one time) to report as determined in collaboration with the Client
9. Delivery of final report.

IV. Pre-site Visit Questionnaire and Document Request

In order for Global Solution Partners to provide the most thorough and accurate Reserve Study Report possible, the Client shall complete a questionnaire and document request which will be provided to the Client upon acceptance of this proposal. The Client agrees to deliver the completed questionnaire and requested documents to Global Solution Partners within three business days of receipt of the questionnaire.

Initial here: _____

V. Fees

There are three options for the Reserve Study services presented in this proposal. Options #2 and #3 allow the association to spread out and budget for future study costs.

Option #1: Full Reserve Study with Site Visit for \$5,475.00

The Full Reserve Study is a stand-alone study with a site visit that includes all items listed under the Scope of Services section on page 8. This study will be performed promptly after Global Solution Partners receives the completed client questionnaire. The total fee for this option is \$5,475.00. The payment is due in full upon delivery of the initial report.

Proposal Terms and Conditions

Option #2: Clear Vision Package for a total of \$12,866.25

The Clear Vision Package includes one Full Reserve Study with a site visit to be performed promptly after Global Solution Partners receives the completed client questionnaire. Two updates will be performed in the two subsequent years. The first will be a Reserve Study Update without Site Visit, which will occur on or about the first anniversary of the original Full Reserve Study. The second update will be a Reserve Study Update with Site Visit, which will occur on or about the second anniversary of the original Full Reserve Study.

The total fee for this option is \$12,866.25, paid annually for three years. \$6,433.13, is due on delivery of the Full Reserve Study initial report. \$3,216.56 is due on the first anniversary date, at which time a Reserve Study Update without Site Visit will be performed. \$3,216.56 is due on the second anniversary date, at which time a Reserve Study Update with Site visit will be performed.

Option #3: Ongoing Partnership Solution for a down payment of \$2,190.00 and monthly payments of \$237.25

The Ongoing Partnership Solution includes one Full Reserve Study with a site visit to be performed promptly after Global Solution Partners receives the completed client questionnaire. Additionally, three updates will be performed over the five-year term. The Client will choose the timing of one Reserve Study Update with Site Visit and two Reserve Study Updates without Site Visits.

After the five-year term, the service agreement will automatically renew for an additional five-year term with Global Solution Partners providing three Reserve Study Updates and consulting in the same manner as outlined above for the initial term. If the Client wishes to discontinue the service they must do so in writing no later than 30 days prior to the end of the initial term.

A down payment of \$2,190.00 is due upon proposal acceptance. \$237.25 is due monthly for a five-year term on or before the last day of the month, beginning the calendar month following the month in which the proposal acceptance was received. Monthly payments will be made using the Pay Now options listed on your monthly invoice email. Follow the link and choose the payment option you prefer; Debit/Credit or Bank Transfer. The total five-year cost is \$16,425.00.

Termination

If Option #2 or Option #3 is chosen and the Client wishes to terminate the agreement at any point during the agreement period, the Client is obligated to pay immediately the balance of the uncollected fees for reserve study services rendered. Accounts in arrears more than 30 days shall accrue interest at 1.5% per month. The Client will be responsible for all costs, including reasonable attorney fees, incurred in pursuing collection.

Proposal Terms and Conditions

Additional Services

Upon client request, additional services (such as meeting attendance beyond those included or additional rounds of revisions) may be provided at our normal hourly rate (currently \$150 per hour). This rate also includes continued access for an additional 60 days to our Funding Plan Scenario Calculator in order to aid discussions with the project manager.

VI. Reserve Study Production Procedures

Report Delivery

The preliminary report is typically delivered to the Client within 30 days of receiving the completed client questionnaire. The report production time may vary based on the availability of documents provided by the Client, client responsiveness to specific questions, and existing workload. Upon client request, a quicker report delivery may be arranged if agreed to in advance.

Interest and Inflation

Unless specifically requested otherwise by the Client, interest on the reserve fund balances and inflation on the future replacement costs will be factored into the study. It is important that the Client has the study updated every year or two to keep these variables current and relevant.

Study Period

Unless otherwise agreed upon with the Client, the study period will include the 30 year period immediately following the study start date.

Report Revisions

Global Solution Partners is highly focused on working collaboratively with the Client to ensure that the Reserve Study delivered is customized to the Client's needs. With that in mind, upon delivery of the initial report, the Client should closely review the Reserve Study and submit all questions, comments, and suggested edits in writing to Global Solution Partners within 60 days. Revisions will typically be completed within two weeks of receiving the written request. There is no additional charge for the first round of revisions. Subsequent revisions may be billed at our normal hourly rate. If the Client provides no request within 60 days of the delivery of the initial report then the initial report shall be considered to be the final report.

Initial here: _____

Proposal Terms and Conditions

Funding Plan Scenario Calculator

The Funding Plan Scenario Calculator is a proprietary online spreadsheet tool allowing board members and financial planners to run “what-if” scenarios on our suggested funding plans. This tool allows the Client to collaborate with the Project Manager during the completion of the final reserve study report. The Client will have 60 days from delivery of the preliminary report to review and submit questions, comments, and suggested edits, having unlimited access to the Scenario Calculator Funding Plan tool during this timeframe. Subsequent revisions and revisions requested beyond the 60-day post-report delivery may be billed at our normal hourly rate of \$150, and the Client will have continued access to the Scenario Calculator during this process for up to another 60 days. Clients that choose the monthly ongoing Partnership program will have access to the Scenario Calculator during the full five-year term.

Meeting Participation

At the request of the Client, a Global Solution Partners representative will be available to meet with the Client after the delivery of the initial report to discuss the Reserve Study recommendations and to answer any questions. This meeting will be via teleconference. There is no additional charge for this first meeting. Additional meetings will be charged at our normal hourly rate.

Remaining Useful Life Estimates

The remaining useful life expectancies assigned to components/systems within the study are based on typical life expectancies for similar components/systems, industry experience, and apparent current visible condition at the time of the site evaluation. These estimates are in no way to be considered a guarantee of the remaining life of any component or system and are to be viewed as general guides for the sole purpose of assisting in financial planning. Many factors may impact the actual life expectancies including but not limited to: manufacturing quality, installation methods, maintenance practices, usage, and climate conditions.

Replacement Cost Estimates

The replacement/maintenance costs assigned to components/systems within the study are based on multiple sources including specific information provided by the Client, professional experience, cost estimating guides, and Global Solution Partners’s proprietary database. The estimates are in no way to be considered bids for replacement/maintenance of the components/systems and there is no guarantee implied that the estimates will be in alignment with actual costs. The estimates are to be viewed as general guides for the sole purpose of assisting in financial planning.

Information Provided by Client

It is assumed by Global Solution Partners that all financial and other information provided by the Client is accurate and complete. The Client is responsible for providing requested available

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documents for review. Examples of documents typically requested are, CC&Rs, site plans, reserve fund balance statements, and maintenance records.

Confidentiality

Global Solution Partners agrees to treat as confidential all client information collected during the performance of this study. The Client agrees that the Reserve Study report provided by Global Solution Partners contains intellectual property and the Client, therefore, will not rely on its content in the formation of any report or evaluation performed by a third party without the express written consent of Global Solution Partners.

Purpose of the Reserve Study

The purpose of the Reserve Study report is to provide recommendations for funding reserve accounts allocated to capital expenses associated with the replacement/maintenance of included components/systems. This study is not intended to be or take the place of an Insurance Appraisal, Property Condition Assessment, engineering services, or any other specialized analysis.

VII. Site Evaluation Procedures

Standards of Care

Global Solution Partners will perform the Reserve Study in accordance with the Community Association Institute (CAI) guidelines. This service is not intended to identify all defects nor provide any guarantee for future performance for any of the components/systems.

Visual Evaluation

The site evaluation performed for a Reserve Study is visual in nature and designed to evaluate the current condition of a representative sampling of the components/systems included in the study for the sole purpose of determining approximate remaining useful life expectancies in order to create a guideline for future replacement/maintenance timing and cost. Hidden components such as but not limited to concealed piping and wiring are evaluated solely on their approximate age, environmental conditions, and anecdotal information provided by the Client.

The evaluation is not intended to be an exhaustive inspection nor any type of engineering analysis. The Site Specialist will not open or disassemble any equipment, enter any areas where access is not readily provided, nor enter any areas that may be deemed hazardous. Upon client request, Global Solution Partners may perform or arrange to have performed inspections, analysis, or testing by qualified individuals. Fees and conditions of such services would be separate and apart from this agreement.

Unless otherwise specifically added to and defined under the What to Expect section of this agreement on page 8, evaluation of and/or reporting on the following are specifically excluded

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from the service provided under this agreement. This includes building codes, fire safety codes, municipal ordinances, zoning requirements, ADA compliance, hazardous materials (such as but not limited to radon, lead paint, EMFs, asbestos, and mold), concealed components/systems, latent defects, specialty equipment, etc.

Site Access

The Client agrees to provide Global Solution Partners access to all areas (secured and unsecured) of the site needed to collect information for the purpose of generating the Reserve Study report. This includes access to the roof if (applicable) and all other elements listed in the Property Details section on page 8. If special equipment (such as ladders or lifts) is needed to safely access certain areas it shall be provided by the Client.

It is expected that a client representative will meet Global Solution Partners onsite at the pre-arranged date and time to provide access if in-person access is required. If for any reason the site or any area thereof cannot be accessed at the scheduled time, and this results in requiring additional trips, the Client agrees to additional fees billed at our normal hourly rate to cover the additional site and travel time.

Notice to Residents

It is the Client's responsibility to notify the occupants on the site of the presence of Global Solution Partners in advance of the scheduled date of the site visit.

Additional Services

Upon client request, Global Solution Partners may perform or arrange to have performed inspections, analysis, or testing by qualified individuals. Fees and conditions of such services would be separate and apart from this agreement.

VIII. Expiry

This Proposal is valid for 6 months from the date of the proposal.

Proposal Acceptance

Please complete the information below, electronically sign, or manually sign and return by email to info@globalreservestudies.com. Or, fax to (844) 477-7883.

The Client agrees to the following:

1. The study is to be performed according to the terms stated in this proposal.
2. The Client will coordinate access to the property with Global Solution Partners.
3. The Client will complete and return the pre-site visit questionnaire within three business days of receiving it and provide the requested documents to the extent they are available.
4. The funding recommendations in the report are opinions based on a visual evaluation of representative components at the time of the site visit, in the readily accessible areas of the property, and from information provided by the Client and/or their representative. The report is not a guarantee, warranty, or insurance policy.
5. The Client understands and agrees that the liability of Global Solution Partners, its employees, and its agents, is limited to the collected Reserve Study Fee.

Name of Association: Original Carrollwood Tax District
Property Location: 3515 McFarland Road, Tampa, FL 33618
Proposal Date: April 20, 2023

Service Options

Options #2 or #3 allow the association to spread out and budget for future study costs.

Please initial **one option only**.

Initial: ___ Option #1: Full Reserve Study with Site Visit for \$5,475.00. Payment is due in full upon delivery of the initial report. Includes access to the Funding Plan Scenario Calculator for 60 days.

Initial: ___ Option #2: Clear Vision Package for \$12,866.25. The Clear Vision Package includes three Reserve Studies, paid annually for three years. It consists of one Full Reserve Study with Site Visit + one Reserve Study Update without Site Visit + one Reserve Study Update with Site Visit = \$12,866.25, paid in three annual installments. Includes access to the Scenario Calculator for 60 days following initial delivery of each study.

\$6,433.13, is due on delivery of the Full Reserve Study initial report. \$3,216.56 is due on the first anniversary date, at which time a Reserve Study Update without Site Visit will be performed. \$3,216.56 is due on the second anniversary date, at which time a Reserve Study Update with Site visit will be performed. See the Fees section on page 9 for more detail.

Initial: ___ Option #3: Ongoing Partnership Solution for a down payment of \$2,190.00 and monthly payments of \$237.25. The Ongoing Partnership Solution includes four Reserve Studies, paid monthly for five years. It consists of one Full Reserve Study with Site Visit + two Reserve Study Updates without Site Visits + one Reserve Study Updates with Site Visit = a total fee of \$16,425.00. Includes access to the Scenario Calculator for the five-year term.

A down payment of \$2,190.00 is due upon proposal acceptance, and \$237.25 is due monthly for a five-year term. See the Fees section on page 9 for more detail.

I have read, understand, and accept the terms of this proposal:

Name:

Position:

Phone:

Email:

Signature: _____

Date: _____