

PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT



MEETING AGENDA

APRIL 16, 2024

PREPARED BY:

JPWARD & ASSOCIATES, LLC, 2301 NORTHEAST 37th STREET, FORT LAUDERDALE, FL 33308

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PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT

April 9, 2024

Board of Supervisors

Pioneer Ranch Community Development District

Dear Board Members:

The regular meeting of the Board of Supervisors of the Pioneer Ranch Community Development District will be held on **Tuesday, April 16, 2024**, at **3:30 P.M.** at the offices of **Lennar Homes, 2100 SE 17th Street, Suite 601, Ocala, FL 34471.**

The following Webex link and telephone number are provided to join/watch the meeting remotely.

<https://districts.webex.com/districts/j.php?MTID=m4df91314fa858eb657f2c9fa3ebef8f2>

Access Code: **2338 494 3241**, Event password: **Jpward**

Phone: **408-418-9388** and enter the access code **2338 494 3241**, password: **Jpward (579274** from phones) to join the meeting.

Agenda

1. Call to Order & Roll Call.
2. Notice of Advertisement of Public Hearings.
3. Administration of Oath of Office for the Board of Supervisors of the Pioneer Ranch Community Development District.
 - a) Oath of Office.
 - b) Guide to the Sunshine Amendment and Code of Ethics.
 - c) Form 1 – Statement of Financial Interests.
4. Consideration of **Resolution 2024-22**, a Resolution of the Board of Supervisors Re-Designating Certain Officers of the Pioneer Ranch Community Development District following the Landowners' Election.
5. Consideration of **Resolution 2022-23**, a Resolution of the Board of Supervisors canvassing and certifying the results of the landowners' election of Supervisors held pursuant to Section 190.006(2), *Florida Statutes*.

6. Consideration of **Resolution 2024-24**, a Resolution of the Board of Supervisors extending the Terms of Office of all current Supervisors to coincide with the General Election pursuant to Section 190.006 of the Florida Statutes; providing for severability; and providing an effective date.
7. Consideration of Minutes:
 - I. January 23, 2024 - Organizational Meeting Minutes.
8. Ranking of engineering proposal(s) to serve as District Engineer and consideration and approval of a Master Engineering Services Agreement.
 - a) Ranking of engineering proposal.
 - b) Consideration and approval of the form of Master Engineering Services Agreement between the Pioneer Ranch Community Development District and Tillman and Associates, for Engineering Services.

FISCAL YEAR 2024 BUDGET MATTERS

9. **PUBLIC HEARINGS.**
 - a. **FISCAL YEAR 2024.**
 - i. Public Comment and Testimony.
 - ii. Board Comment and Consideration.
 - iii. Consideration of **Resolution 2024-25**, a Resolution of the Board of Supervisors adopting the annual appropriation and budget for Fiscal Year 2024.

FISCAL YEAR 2025 BUDGET MATTERS

10. Consideration of **Resolution 2024-26**, a Resolution of the Board of Supervisors approving the Fiscal Year 2025 Proposed Budget for and setting a Public Hearing for **Tuesday, July 16, 2024, at 3:30 p.m.**, at the offices of **Lennar Homes, 2100 SE 17th Street, Suite 601, Ocala, FL 34471**.
11. Consideration of **Resolution 2024-27**, a Resolution of the Board of Supervisors designating a date, time, and location of a public hearing regarding the District's intent to use the uniform method for the levy, collection, and enforcement of non-ad valorem special assessments as authorized by Section 197.3632, Florida Statutes. The Public Hearing is scheduled for **July 16, 2024, at 3:30 p.m.**, at the offices of **Lennar Homes, 2100 SE 17th Street, Suite 601, Ocala, FL 34471**.

-
12. Staff Reports
 - I. District Attorney.
 - a) New performance reporting requirements for CDDs.
 - II. District Engineer.

- III. District Manager.
 - a) Florida Law Changes to Form 1 filings.
 - b) **Board Meeting Dates for Balance of Fiscal Year 2024.**
 - i. Public Hearings:
 - 1. Fiscal Year 2025 Budget – July 16, 2024, 3:30 P.M.
 - 2. Uniform Method of Collection – July 16, 2024, 3:30 P.M.
 - b) Financial Statement for period ending March 31, 2024 (unaudited).

13. Supervisor’s Requests.

14. Public Comments.

The public comment period is for items not listed on the Agenda, and comments are limited to three (3) minutes per person and assignment of speaking time is not permitted; however, the Presiding Officer may extend or reduce the time for the public comment period consistent with Section 286.0114, Florida Statutes.

15. Adjournment.

Summary of Agenda

The first order of business is the call to order & rollcall.

The second order of business is Notice of Advertisement of the Public Hearings.

The third order of business is general in nature and the Board Members who were elected at the Landowners’ meeting held just prior to today’s meeting will subscribe to an Oath of Office and will be sworn in at the meeting.

In addition, the newly elected Board must file a Form 1 – Statement of Financial Interests, which must be filed with the Commission on Ethics within thirty (30) days of being seated on this Board (filing deadline is May 16, 2024). **Please be aware that if a member does not file on time, the Commission on Ethics/State can fine a member up to \$25.00/day for not filing a Form 1 on time. The State has been more stringent these days on these form 1 filings, so please ensure you file on time.**

Additionally, if any of the newly elected Board currently sits as members of any other Community Development District Boards, you must amend your current Form 1 – Statement of Financial Interests to now include the Pioneer Ranch Community Development District. The amended form must be filed with the Commission on Ethics within thirty (30) days of being seated on this Board of Supervisors (filing deadline is May 16, 2024).

The fourth order of business **Resolution 2024-22**, which designates the officers of the Pioneer Ranch Community Development District after the outcome of the Landowners’ Election which was held on April 16, 2024. Below are the existing officers for the District.

OFFICE	NAME OF OFFICE HOLDER
CHAIRPERSON	
VICE-CHAIRPERSON	
ASSISTANT SECRETARY	
ASSISTANT SECRETARY	
ASSISTANT SECRETARY	
SECRETARY & TREASURER	JAMES P. WARD

The fifth order of business is the consideration of **Resolution 2024-23**, a Resolution of the Board of Supervisors of the Pioneer Ranch Community Development District canvassing and certifying the results of the Landowners’ Election of Supervisors held pursuant to Section 190.006(2), Florida Statutes, and providing for an effective date.

We will insert the names and number of votes for each of the individuals that are elected at the landowners’ meeting. Of specific note is the manner in which terms for the supervisors will be set.

The two persons receiving the highest two vote totals would serve the two terms expiring April 2028 and the other three persons would serve out the remainder of the terms expiring April 2026.

The sixth order of business is the consideration of **Resolution 2024-24**, a Resolution of the Board of Supervisors of the Pioneer Ranch Community Development District extending the Terms of Office of all current Supervisors to coincide with the General Election pursuant to Section 190.006 of the Florida Statutes; providing for severability; and providing an effective date.

The seventh order of business is the consideration and acceptance of the minutes from the Pioneer Ranch Board of Supervisors Organizational meeting held on January 23, 2024.

The eighth order of business is the is the consideration of the ranking of the engineering proposals that were received in response to the District’s request for qualifications. There was one proposal received from Tillman and Associates, LLC. The required procedure requires the Board to rank the proposals, (non-price based) based on each firm’s qualifications, and I have enclosed an engineering ranking form for your use. The ranking form itself is NOT required, and you may use any procedure that you would like. Once ranked, staff must then negotiate a contract with the number one ranked firm and that proposed agreement will then be brought to the Board.

In order to shorten the process somewhat, I have enclosed a form of engineering services agreement that I will ask the Board to approve, subject only to non-substantive changes that may be needed once I review the agreement with the number one (1) ranked firm.

The ninth order of business is the required Public Hearings to consider: (i) the adoption of the District's Fiscal Year 2024 Budget (**Resolution 2024-25**).

The Public Hearing will be conducted in parts. First, the District's Staff will make a presentation on the purpose of the Public Hearing itself. At the completion of the staff presentation, the Board will be asked by the District's Staff to open the Public Comment/Testimony portion of the hearing. This is the time that any member of the public will be asked if he/she has any comments, questions, and/or testimony to provide to the Board. All questions will be limited to ONLY this item, and speakers will be asked to state their name of record, and to ask questions or make comments related to the assessments and/or financing, and then the Board or Staff will respond accordingly.

Generally, the Board will limit a speaker to no more than three (3) minutes, to afford the opportunity for all to be heard during the Public Comment portion of the hearing.

At the conclusion of the Public Comment/Testimony portion, the Board will close the Public Hearing, and no further comments, questions, and/or testimony will be heard by the Board at the close of the hearing.

The next portion of the Public Hearing will be for the Board Comment portion of the hearing, where the Board may fully discuss and make any comments that they determine appropriate or to ask the District's Staff any questions that they may have that either came up during the Public Comment/Testimony portion of the hearing, or that the Board may have related to the relevant resolution to be adopted. The staff will be prepared to address any questions from the Board.

At the conclusion of the Board Comment section of the Public Hearing, the final step in the process is to adopt the relevant resolution being presented, **Resolution 2024-25**.

9a. The first Public Hearing deals with the adoption of the Fiscal Year 2024 Budget which includes the General Fund operations. For background, the Board approved the Fiscal Year 2024 Budget at the January 23, 2024, meeting, solely for the purpose of permitting the District to move through the process towards this hearing to adopt the Budget and set the final assessment rates for the ensuing Fiscal Year.

At the conclusion of the Public Hearing related to the adoption of the Budget, I will ask the Board to consider **Resolution 2024-25**, which adopts the Fiscal Year 2024 Budget.

The tenth order of business is the consideration of **Resolution 2024-26**, a resolution of Board of Supervisors, approving the Fiscal Year 2025 Proposed Budget and sets a Public Hearing for **Tuesday, July 16, 2024, at 3:30 p.m.**, at the offices of **Lennar Homes, 2100 SE 17th Street, Suite 601, Ocala, FL 34471**. The adoption of a budget is mandated by law, and funding for the Budget will come from the developer initially, Lennar Homes pursuant to an agreement to fund the operations of the District.

Once the District issues Bonds, we will begin the process of levying assessments for operations to be placed on property tax bills of owners.

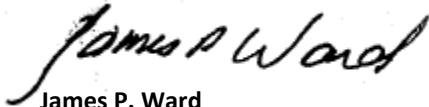
The Public Hearing is scheduled for **July 16, 2024, at 3:30 p.m.**, at the offices of **Lennar Homes, 2100 SE 17th Street, Suite 601, Ocala, FL 34471.**

The eleventh order of business is the consideration of **Resolution 2024-27**, a Resolution of the Board of Supervisors designating a date, time, and location of a public hearing regarding the District’s intent to use the uniform method for the levy, collection, and enforcement of non-ad valorem special assessments as authorized by Section 197.3632, Florida Statutes. The Public Hearing is scheduled for **July 16, 2024, at 3:30 p.m.**, at the offices of **Lennar Homes, 2100 SE 17th Street, Suite 601, Ocala, FL 34471.**

If you have any questions and/or comments before the meeting, please do not hesitate to contact me directly by phoning (954) 658-4900.

Sincerely,

Pioneer Ranch Community Development District



James P. Ward
District Manager

The Meetings for Fiscal Year 2024 are as follows:

<u>April 16, 2024</u>	May 21, 2024
<u>June 18, 2024</u>	<u>July 16, 2024</u>
<u>August 20, 2024</u>	<u>September 17, 2024</u>

Thank you for placing your order with us.

Ocala Legals <StarBannerLegals@gannett.com>

Tue 2/27/2024 12:23 PM

To:Katherine Selchan <KatherineSelchan@jpwardassociates.com>

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This is your confirmation that your order has been submitted. Below are the details of your transaction. Please save this confirmation for your records.

We appreciate you using our online self-service ads portal, available 24/7. Please continue to visit Ocala StarBanner's online Classifieds [HERE](#) to place your legal notices in the future.

Changes and/or cancellations may not be honored up to 2 business days prior to your first publication date.

Job Details

Order Number: **LSAR0067181**
Classification: **Govt Public Notices**
Package: **General Package**
Total payment: **\$343.52**

Account Details

Pioneer Ranch CDD
2301 NE 37th ST
Fort Lauderdale, FL ♦ 33308-6242
954-658-4900
KatherineSelchan@jpwardassociates.com
Pioneer Ranch CDD

Schedule for ad number LSAR00671810

Sun Mar 24, 2024
Ocala StarBanner *All Zones*
Sun Mar 31, 2024
Ocala StarBanner *All Zones*

NOTICE OF LANDOWNERS MEETING PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT

The Board of Supervisors of the Pioneer Ranch Community Development District will hold a Landowners Meeting at **3:30 P.M. on Tuesday, April 16, 2024**, at the **offices of Lennar Homes, 2100 SE 17th Street, Suite 601, Ocala, FL 34471**. The meeting is being held for the necessary public purpose of considering such business as more fully identified in the meeting agenda, a copy of which will be posted on the District's website at www.PioneerRanchcdd.org.

The meeting is open to the public and will be conducted in accordance with the provisions of Florida Law for Community Development Districts. A copy of the agenda for the meeting may be obtained from the office of the District Manager, JPWard & Associates LLC, located at 2301 Northeast 37th Street, Fort Lauderdale, Florida 33308, or by calling (954) 658-4900, emailing JimWard@JPWardAssociates.com, or on the District's website at www.PioneerRanchcdd.org at least seven (7) days in advance of the meeting.

The meeting may be cancelled or continued to a date, time and location specified on the record at the meeting.

In accordance with the provisions of the Americans with Disabilities Act, any person requiring special accommodations or an interpreter to participate at these meetings should contact the District at (954) 658-4900, at least five (5) days prior to the date of the meetings. If you are hearing or speech impaired, please contact the Florida Relay Service at 1-800-955-8770, for assistance in contacting the District Office.

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

Pioneer Ranch Community Development District
James P. Ward, District Manager
Publication Dates
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PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT NOTICE OF PUBLIC HEARING TO CONSIDER THE ADOPTION OF THE FISCAL YEAR 2024 BUDGET AND NOTICE OF REGULAR BOARD OF SUPERVISORS MEETING

The Board of Supervisors (“**Board**”) of the Pioneer Ranch Community Development District (“**District**”) will hold a public hearing on **Tuesday, April 16, 2024 at 3:30 PM** at the offices of **Lennar Homes, 2100 SE 17th Street, Suite 601, Ocala, Florida 34471**. The meeting is being held for the necessary public purpose of considering such business as are more fully identified in the meeting agenda, a copy of which will be posted on the District’s website at www.PioneerRanchcdd.org.

The purpose of this meeting is for the Board to consider the adoption of the Proposed Budget(s) (“**Proposed Budget**”) of the District for the fiscal year ending September 30, 2024 (“**Fiscal Year 2024**”). A regular board meeting of the District will also be held at that time where the Board may consider any other business that may properly come before it. A copy of the agenda and Proposed Budget may be obtained at the offices of the District Manager, c/o JP Ward and Associates, LLC, 2301 Northeast 37th Street, Fort Lauderdale, Florida 33308, Phone (954) 658-4900 (“**District Manager’s Office**”), during normal business hours.

The public hearing and meeting are open to the public and will be conducted in accordance with the provisions of Florida law. The public hearing and meeting may be continued to a date, time, and place to be specified on the record at the meeting. There may be occasions when Board Supervisors or District Staff may participate by speaker telephone.

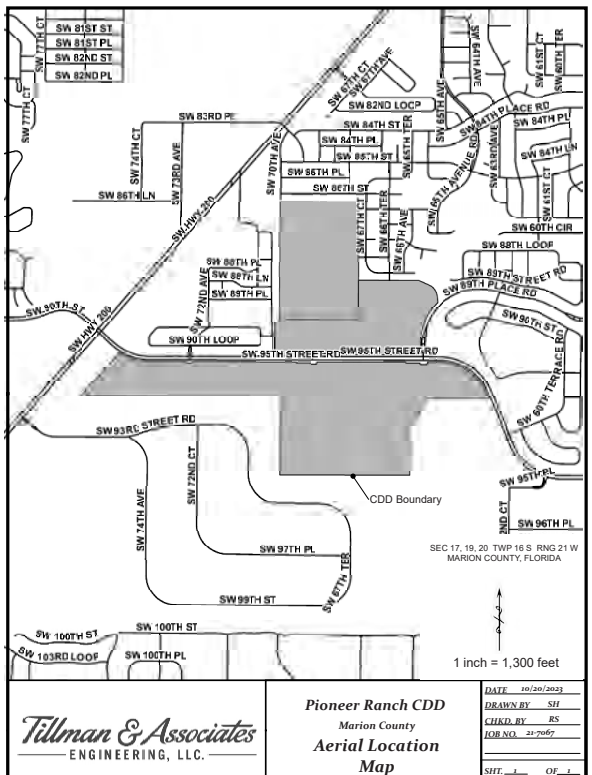
Any person requiring special accommodation at this meeting because of a disability or physical impairment should contact the District Manager’s Office at least forty-eight (48) hours prior to the meeting. If you are hearing or speech impaired, please contact the Florida Relay Service by dialing 7-1-1, or 1-800-955-8771 (TTY) / 1-800-955-8770 (Voice), for aid in contacting the District Manager’s Office.

In accordance with the provisions of the Americans with Disabilities Act, any person requiring special accommodations or an interpreter to participate at this meeting should contact the District Manager by telephone at (954) 658-4900 at least seven (7) days prior to the date of the particular meeting. Toward that end, anyone wishing to listen and participate in the meeting can do so by connecting to a link that will be posted on the District’s website: www.PioneerRanchcdd.org.

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

Pioneer Ranch Community Development District

James P. Ward
District Manager



OATH OR AFFIRMATION OF OFFICE

I, _____, a citizen of the State of Florida and of the United States of America, and being an officer of the **Pioneer Ranch Community Development District** and a recipient of public funds as such officer, do hereby solemnly swear or affirm that I will support the Constitution of the United States and of the State of Florida, and will faithfully, honestly and impartially discharge the duties devolving upon me as a member of the Board of Supervisors of the **Pioneer Ranch Community Development District**, Marion County, Florida.

Signature

Printed Name: _____

STATE OF FLORIDA
COUNTY OF _____

Sworn to (or affirmed) before me by means of () physical presence or () online notarization this ____ day of _____ 2024, by _____, whose signature appears hereinabove, who is personally known to me or who produced _____ as identification.

NOTARY PUBLIC
STATE OF FLORIDA

Print Name: _____

My Commission Expires: _____

FLORIDA COMMISSION ON ETHICS



GUIDE
to the
SUNSHINE AMENDMENT
and
CODE of ETHICS
for Public Officers and Employees

2024

State of Florida
COMMISSION ON ETHICS

Ashley Lukis, *Chair*
Tallahassee

Michelle Anchors, *Vice Chair*
Fort Walton Beach

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St. Petersburg

Kerrie Stillman
Executive Director
P.O. Drawer 15709
Tallahassee, FL 32317-5709
www.ethics.state.fl.us
(850) 488-7864*

*Please direct all requests for information to this number.

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I. HISTORY OF FLORIDA'S ETHICS LAWS

Florida has been a leader among the states in establishing ethics standards for public officials and recognizing the right of citizens to protect the public trust against abuse. Our state Constitution was revised in 1968 to require a code of ethics, prescribed by law, for all state employees and non-judicial officers prohibiting conflict between public duty and private interests.

Florida's first successful constitutional initiative resulted in the adoption of the Sunshine Amendment in 1976, providing additional constitutional guarantees concerning ethics in government. In the area of enforcement, the Sunshine Amendment requires that there be an independent commission (the Commission on Ethics) to investigate complaints concerning breaches of public trust by public officers and employees other than judges.

The Code of Ethics for Public Officers and Employees is found in Chapter 112 (Part III) of the Florida Statutes. Foremost among the goals of the Code is to promote the public interest and maintain the respect of the people for their government. The Code is also intended to ensure that public officials conduct themselves independently and impartially, not using their offices for private gain other than compensation provided by law. While seeking to protect the integrity of government, the Code also seeks to avoid the creation of unnecessary barriers to public service.

Criminal penalties, which initially applied to violations of the Code, were eliminated in 1974 in favor of administrative enforcement. The Legislature created the Commission on Ethics that year "to serve as guardian of the standards of conduct" for public officials, state and local. Five of the Commission's nine members are appointed by the Governor, and two each are appointed by the President of the Senate and Speaker of the House of Representatives. No more than five Commission members may be members of the same political party, and none may be lobbyists, or hold any public employment during their two-year terms of office. A chair is selected from among the members to serve a one-year term and may not succeed himself or herself.

II. ROLE OF THE COMMISSION ON ETHICS

In addition to its constitutional duties regarding the investigation of complaints, the Commission:

- Renders advisory opinions to public officials;
- Prescribes forms for public disclosure;
- Prepares mailing lists of public officials subject to financial disclosure for use by Supervisors of Elections and the Commission in distributing forms and notifying delinquent filers;
- Makes recommendations to disciplinary officials when appropriate for violations of ethics and disclosure laws, since it does not impose penalties;
- Administers the Executive Branch Lobbyist Registration and Reporting Law;
- Maintains financial disclosure filings of constitutional officers and state officers and employees; and,
- Administers automatic fines for public officers and employees who fail to timely file required annual financial disclosure.

III. THE ETHICS LAWS

The ethics laws generally consist of two types of provisions, those prohibiting certain actions or conduct and those requiring that certain disclosures be made to the public. The following descriptions of these laws have been simplified in an effort to provide notice of their requirements. Therefore, we suggest that you also review the wording of the actual law. Citations to the appropriate laws are in brackets.

The laws summarized below apply generally to all public officers and employees, state and local, including members of advisory bodies. The principal exception to this broad coverage is the exclusion of judges, as they fall within the jurisdiction of the Judicial Qualifications Commission.

Public Service Commission (PSC) members and employees, as well as members of the PSC Nominating Council, are subject to additional ethics standards that are enforced by the Commission on Ethics under Chapter 350, Florida Statutes. Further, members of the governing boards of charter schools are subject to some of the provisions of the Code of Ethics [Sec. 1002.33(26), Fla. Stat.], as are the officers, directors, chief executive officers and some employees of business entities that serve as the chief administrative or executive officer or employee of a political subdivision. [Sec. 112.3136, Fla. Stat.]

A. PROHIBITED ACTIONS OR CONDUCT

1. Solicitation and Acceptance of Gifts

Public officers, employees, local government attorneys, and candidates are prohibited from soliciting or accepting anything of value, such as a gift, loan, reward, promise of future employment, favor, or service, that is based on an understanding that their vote, official action, or judgment would be influenced by such gift. [Sec. 112.313(2), Fla. Stat.]

Persons required to file financial disclosure FORM 1 or FORM 6 (see Part III F of this brochure), and state procurement employees, are prohibited from **soliciting** any gift from a political committee, lobbyist who has lobbied the official or his or her agency within the past 12 months, or the partner, firm, employer, or principal of such a lobbyist or from a vendor doing business with the official's agency. [Sec. 112.3148, Fla. Stat.]

Persons required to file FORM 1 or FORM 6, and state procurement employees are prohibited from directly or indirectly **accepting** a gift worth more than \$100 from such a lobbyist, from a partner, firm, employer, or principal of the lobbyist, or from a political committee or vendor doing business with their agency. [Sec.112.3148, Fla. Stat.]

However, notwithstanding Sec. 112.3148, Fla. Stat., no Executive Branch lobbyist or principal shall make, directly or indirectly, and no Executive Branch agency official who files FORM 1 or FORM 6 shall knowingly accept, directly or indirectly, **any expenditure** made for the purpose of lobbying. [Sec. 112.3215, Fla. Stat.] Typically, this would include gifts valued at less than \$100 that formerly

were permitted under Section 112.3148, Fla. Stat. Similar rules apply to members and employees of the Legislature. However, these laws are not administered by the Commission on Ethics. [Sec. 11.045, Fla. Stat.]

Also, persons required to file Form 1 or Form 6, and state procurement employees and members of their immediate families, are prohibited from accepting any gift from a political committee. [Sec. 112.31485, Fla. Stat.]

2. *Unauthorized Compensation*

Public officers or employees, local government attorneys, and their spouses and minor children are prohibited from accepting any compensation, payment, or thing of value when they know, or with the exercise of reasonable care should know, that it is given to influence a vote or other official action. [Sec. 112.313(4), Fla. Stat.]

3. *Misuse of Public Position*

Public officers and employees, and local government attorneys are prohibited from corruptly using or attempting to use their official positions or the resources thereof to obtain a special privilege or benefit for themselves or others. [Sec. 112.313(6), Fla. Stat.]

4. *Abuse of Public Position*

Public officers and employees are prohibited from abusing their public positions in order to obtain a disproportionate benefit for themselves or certain others. [Article II, Section 8(h), Florida Constitution.]

5. *Disclosure or Use of Certain Information*

Public officers and employees and local government attorneys are prohibited from disclosing or using information not available to the public and obtained by reason of their public position, for the personal benefit of themselves or others. [Sec. 112.313(8), Fla. Stat.]

6. *Solicitation or Acceptance of Honoraria*

Persons required to file financial disclosure FORM 1 or FORM 6 (see Part III F of this brochure), and state procurement employees, are prohibited from **soliciting** honoraria related to their public offices or duties. [Sec. 112.3149, Fla. Stat.]

Persons required to file FORM 1 or FORM 6, and state procurement employees, are prohibited from knowingly **accepting** an honorarium from a political committee, lobbyist who has lobbied the person's agency within the past 12 months, or the partner, firm, employer, or principal of such a lobbyist, or from a vendor doing business with the official's agency. However, they may accept the payment of expenses related to an honorarium event from such individuals or entities, provided that the expenses are disclosed. See Part III F of this brochure. [Sec. 112.3149, Fla. Stat.]

Lobbyists and their partners, firms, employers, and principals, as well as political committees and vendors, are prohibited from **giving** an honorarium to persons required to file FORM 1 or FORM 6 and to state procurement employees. Violations of this law may result in fines of up to \$5,000 and prohibitions against lobbying for up to two years. [Sec. 112.3149, Fla. Stat.]

However, notwithstanding Sec. 112.3149, Fla. Stat., no Executive Branch or legislative lobbyist or principal shall make, directly or indirectly, and no Executive Branch agency official who files FORM 1 or FORM 6 shall knowingly accept, directly or indirectly, **any expenditure** made for the purpose of lobbying. [Sec. 112.3215, Fla. Stat.] This may include honorarium event related expenses that formerly were permitted under Sec. 112.3149, Fla. Stat. Similar rules apply to members and employees of the Legislature. However, these laws are not administered by the Commission on Ethics. [Sec. 11.045, Fla. Stat.]

B. PROHIBITED EMPLOYMENT AND BUSINESS RELATIONSHIPS

1. *Doing Business With One's Agency*

- a) A public employee acting as a purchasing agent, or public officer acting in an official capacity, is prohibited from purchasing, renting, or leasing any realty, goods, or

services for his or her agency from a business entity in which the officer or employee or his or her spouse or child owns more than a 5% interest. [Sec. 112.313(3), Fla. Stat.]

- b) A public officer or employee, acting in a private capacity, also is prohibited from renting, leasing, or selling any realty, goods, or services to his or her own agency if the officer or employee is a state officer or employee, or, if he or she is an officer or employee of a political subdivision, to that subdivision or any of its agencies. [Sec. 112.313(3), Fla. Stat.]

2. *Conflicting Employment or Contractual Relationship*

- a) A public officer or employee is prohibited from holding any employment or contract with any business entity or agency regulated by or doing business with his or her public agency. [Sec. 112.313(7), Fla. Stat.]
- b) A public officer or employee also is prohibited from holding any employment or having a contractual relationship which will pose a frequently recurring conflict between the official's private interests and public duties or which will impede the full and faithful discharge of the official's public duties. [Sec. 112.313(7), Fla. Stat.]
- c) Limited exceptions to this prohibition have been created in the law for legislative bodies, certain special tax districts, drainage districts, and persons whose professions or occupations qualify them to hold their public positions. [Sec. 112.313(7)(a) and (b), Fla. Stat.]

3. *Exemptions*—Pursuant to Sec. 112.313(12), Fla. Stat., the prohibitions against doing business with one's agency and having conflicting employment may not apply:

- a) When the business is rotated among all qualified suppliers in a city or county.
- b) When the business is awarded by sealed, competitive bidding and neither the official nor his or her spouse or child have attempted to persuade agency personnel to enter

the contract. NOTE: Disclosure of the interest of the official, spouse, or child and the nature of the business must be filed prior to or at the time of submission of the bid on Commission FORM 3A with the Commission on Ethics or Supervisor of Elections, depending on whether the official serves at the state or local level.

- c) When the purchase or sale is for legal advertising, utilities service, or for passage on a common carrier.
- d) When an emergency purchase must be made to protect the public health, safety, or welfare.
- e) When the business entity is the only source of supply within the political subdivision and there is full disclosure of the official's interest to the governing body on Commission FORM 4A.
- f) When the aggregate of any such transactions does not exceed \$500 in a calendar year.
- g) When the business transacted is the deposit of agency funds in a bank of which a county, city, or district official is an officer, director, or stockholder, so long as agency records show that the governing body has determined that the member did not favor his or her bank over other qualified banks.
- h) When the prohibitions are waived in the case of ADVISORY BOARD MEMBERS by the appointing person or by a two-thirds vote of the appointing body (after disclosure on Commission FORM 4A).
- i) When the public officer or employee purchases in a private capacity goods or services, at a price and upon terms available to similarly situated members of the general public, from a business entity which is doing business with his or her agency.
- j) When the public officer or employee in a private capacity purchases goods or services from a business entity which is subject to the regulation of his or her agency where the price and terms of the transaction are available to similarly situated members of

the general public and the officer or employee makes full disclosure of the relationship to the agency head or governing body prior to the transaction.

4. *Additional Exemptions*

No elected public officer is in violation of the conflicting employment prohibition when employed by a tax exempt organization contracting with his or her agency so long as the officer is not directly or indirectly compensated as a result of the contract, does not participate in any way in the decision to enter into the contract, abstains from voting on any matter involving the employer, and makes certain disclosures. [Sec. 112.313(15), Fla. Stat.]

5. *Legislators Lobbying State Agencies*

A member of the Legislature is prohibited from representing another person or entity for compensation during his or her term of office before any state agency other than judicial tribunals. [Art. II, Sec. 8(e), Fla. Const., and Sec. 112.313(9), Fla. Stat.]

6. *Additional Lobbying Restrictions for Certain Public Officers and Employees*

A statewide elected officer; a member of the legislature; a county commissioner; a county officer pursuant to Article VIII or county charter; a school board member; a superintendent of schools; an elected municipal officer; an elected special district officer in a special district with ad valorem taxing authority; or a person serving as a secretary, an executive director, or other agency head of a department of the executive branch of state government shall not lobby for compensation on issues of policy, appropriations, or procurement before the federal government, the legislature, any state government body or agency, or any political subdivision of this state, during his or her term of office. [Art. II Sec 8(f)(2), Fla. Const. and Sec. 112.3121, Fla. Stat.]

7. *Employees Holding Office*

A public employee is prohibited from being a member of the governing body which serves as his or her employer. [Sec. 112.313(10), Fla. Stat.]

8. *Professional and Occupational Licensing Board Members*

An officer, director, or administrator of a state, county, or regional professional or occupational organization or association, while holding such position, may not serve as a member of a state examining or licensing board for the profession or occupation. [Sec. 112.313(11), Fla. Stat.]

9. *Contractual Services: Prohibited Employment*

A state employee of the executive or judicial branch who participates in the decision-making process involving a purchase request, who influences the content of any specification or procurement standard, or who renders advice, investigation, or auditing, regarding his or her agency's contract for services, is prohibited from being employed with a person holding such a contract with his or her agency. [Sec. 112.3185(2), Fla. Stat.]

10. *Local Government Attorneys*

Local government attorneys, such as the city attorney or county attorney, and their law firms are prohibited from representing private individuals and entities before the unit of local government which they serve. A local government attorney cannot recommend or otherwise refer to his or her firm legal work involving the local government unit unless the attorney's contract authorizes or mandates the use of that firm. [Sec. 112.313(16), Fla. Stat.]

11. *Dual Public Employment*

Candidates and elected officers are prohibited from accepting public employment if they know or should know it is being offered for the purpose of influence. Further, public employment may not be accepted unless the position was already in existence or was created without the anticipation of the official's interest, was publicly advertised, and the officer had to meet the same qualifications and go through the same hiring process as other applicants. For elected public officers already holding public employment, no promotion given for the purpose of influence may be accepted, nor may promotions that are inconsistent with those given other similarly situated employees. [Sec. 112.3125, Fla. Stat.]

C. RESTRICTIONS ON APPOINTING, EMPLOYING, AND CONTRACTING WITH RELATIVES

1. *Anti-Nepotism Law*

A public official is prohibited from seeking for a relative any appointment, employment, promotion, or advancement in the agency in which he or she is serving or over which the official exercises jurisdiction or control. No person may be appointed, employed, promoted, or advanced in or to a position in an agency if such action has been advocated by a related public official who is serving in or exercising jurisdiction or control over the agency; this includes relatives of members of collegial government bodies. NOTE: This prohibition does not apply to school districts (except as provided in Sec. 1012.23, Fla. Stat.), community colleges and state universities, or to appointments of boards, other than those with land-planning or zoning responsibilities, in municipalities of fewer than 35,000 residents. Also, the approval of budgets does not constitute “jurisdiction or control” for the purposes of this prohibition. This provision does not apply to volunteer emergency medical, firefighting, or police service providers. [Sec. 112.3135, Fla. Stat.]

2. *Additional Restrictions*

A state employee of the executive or judicial branch or the PSC is prohibited from directly or indirectly procuring contractual services for his or her agency from a business entity of which a relative is an officer, partner, director, or proprietor, or in which the employee, or his or her spouse, or children own more than a 5% interest. [Sec. 112.3185(6), Fla. Stat.]

D. POST OFFICE HOLDING AND EMPLOYMENT (REVOLVING DOOR) RESTRICTIONS

1. *Lobbying by Former Legislators, Statewide Elected Officers, and Appointed State Officers*

A member of the Legislature or a statewide elected or appointed state official is prohibited for two years following vacation of office from representing another person or entity for compensation before the government body or agency of which the individual was an officer or member. Former members of the Legislature are also prohibited for two years from lobbying the executive branch. [Art. II, Sec. 8(e), Fla. Const. and Sec. 112.313(9), Fla. Stat.]

2. *Lobbying by Former State Employees*

Certain employees of the executive and legislative branches of state government are prohibited from personally representing another person or entity for compensation before the agency with which they were employed for a period of two years after leaving their positions, unless employed by another agency of state government. [Sec. 112.313(9), Fla. Stat.] These employees include the following:

- a) Executive and legislative branch employees serving in the Senior Management Service and Selected Exempt Service, as well as any person employed by the Department of the Lottery having authority over policy or procurement.
- b) serving in the following position classifications: the Auditor General; the director of the Office of Program Policy Analysis and Government Accountability (OPPAGA); the Sergeant at Arms and Secretary of the Senate; the Sergeant at Arms and Clerk of the House of Representatives; the executive director and deputy executive director of the Commission on Ethics; an executive director, staff director, or deputy staff director of each joint committee, standing committee, or select committee of the Legislature; an executive director, staff director, executive assistant, legislative analyst, or attorney serving in the Office of the President of the Senate, the Office of the Speaker of the House of Representatives, the Senate Majority Party Office, the Senate Minority Party Office, the House Majority Party Office, or the House Minority Party Office; the Chancellor and Vice-Chancellors of the State University System; the general counsel to the Board of Regents; the president, vice presidents, and deans of each state university; any person hired on a contractual basis and having the power normally conferred upon such persons, by whatever title; and any person having the power normally conferred upon the above positions.

This prohibition does not apply to a person who was employed by the Legislature or other agency prior to July 1, 1989; who was a defined employee of the State University System or the Public Service Commission who held such employment on December 31, 1994; or who reached normal retirement age and retired by July 1, 1991. It does apply to OPS employees.

PENALTIES: Persons found in violation of this section are subject to the penalties contained in the Code (see PENALTIES, Part V) as well as a civil penalty in an amount equal to the compensation which the person received for the prohibited conduct. [Sec. 112.313(9)(a)5, Fla. Stat.]

3. *6-Year Lobbying Ban*

For a period of six years after vacation of public position occurring on or after December 31, 2022, a statewide elected officer or member of the legislature shall not lobby for compensation on issues of policy, appropriations, or procurement before the legislature or any state government body or agency. [Art. II Sec 8(f)(3)a., Fla. Const. and Sec. 112.3121, Fla. Stat.]

For a period of six years after vacation of public position occurring on or after December 31, 2022, a person serving as a secretary, an executive director, or other agency head of a department of the executive branch of state government shall not lobby for compensation on issues of policy, appropriations, or procurement before the legislature, the governor, the executive office of the governor, members of the cabinet, a department that is headed by a member of the cabinet, or his or her former department. [Art. II Sec 8(f)(3)b., Fla. Const. and Sec. 112.3121, Fla. Stat.]

For a period of six years after vacation of public position occurring on or after December 31, 2022, a county commissioner, a county officer pursuant to Article VIII or county charter, a school board member, a superintendent of schools, an elected municipal officer, or an elected special district officer in a special district with ad valorem taxing authority shall not lobby for compensation on issues of policy, appropriations, or procurement before his or her former agency or governing body. [Art. II Sec 8(f)(3)c., Fla. Const. and Sec. 112.3121, Fla. Stat.]

4. *Additional Restrictions on Former State Employees*

A former executive or judicial branch employee or PSC employee is prohibited from having employment or a contractual relationship, at any time after retirement or termination of employment, with any business entity (other than a public agency) in connection with a contract in which the employee participated personally and substantially by recommendation or decision while a public employee. [Sec. 112.3185(3), Fla. Stat.]

A former executive or judicial branch employee or PSC employee who has retired or terminated employment is prohibited from having any employment or contractual relationship for two years with any business entity (other than a public agency) in connection with a contract for services which was within his or her responsibility while serving as a state employee. [Sec.112.3185(4), Fla. Stat.]

Unless waived by the agency head, a former executive or judicial branch employee or PSC employee may not be paid more for contractual services provided by him or her to the former agency during the first year after leaving the agency than his or her annual salary before leaving. [Sec. 112.3185(5), Fla. Stat.]

These prohibitions do not apply to PSC employees who were so employed on or before Dec. 31, 1994.

5. *Lobbying by Former Local Government Officers and Employees*

A person elected to county, municipal, school district, or special district office is prohibited from representing another person or entity for compensation before the government body or agency of which he or she was an officer for two years after leaving office. Appointed officers and employees of counties, municipalities, school districts, and special districts may be subject to a similar restriction by local ordinance or resolution. [Sec. 112.313(13) and (14), Fla. Stat.]

E. VOTING CONFLICTS OF INTEREST

State public officers are prohibited from voting in an official capacity on any measure which they know would inure to their own special private gain or loss. A state public officer who abstains, or who votes on a measure which the officer knows would inure to the special private gain or loss of any principal by whom he or she is retained, of the parent organization or subsidiary or sibling of a corporate principal by which he or she is retained, of a relative, or of a business associate, must make every reasonable effort to file a memorandum of voting conflict with the recording secretary in advance of the vote. If that is not possible, it must be filed within 15 days after the vote occurs. The memorandum must disclose the nature of the officer's interest in the matter.

No county, municipal, or other local public officer shall vote in an official capacity upon any measure which would inure to his or her special private gain or loss, or which the officer knows would inure to the special private gain or loss of any principal by whom he or she is retained, of the parent organization or subsidiary or sibling of a corporate principal by which he or she is retained, of a relative, or of a business associate. The officer must publicly announce the nature of his or her interest before the vote and must file a memorandum of voting conflict on Commission Form 8B with the meeting's recording officer within 15 days after the vote occurs disclosing the nature of his or her interest in the matter. However, members of community redevelopment agencies and district officers elected on a one-acre, one-vote basis are not required to abstain when voting in that capacity.

No appointed state or local officer shall participate in any matter which would inure to the officer's special private gain or loss, the special private gain or loss of any principal by whom he or she is retained, of the parent organization or subsidiary or sibling of a corporate principal by which he or she is retained, of a relative, or of a business associate, without first disclosing the nature of his or her interest in the matter. The memorandum of voting conflict (Commission Form 8A or 8B) must be filed with the meeting's recording officer, be provided to the other members of the agency, and be read publicly at the next meeting.

If the conflict is unknown or not disclosed prior to the meeting, the appointed official must orally disclose the conflict at the meeting when the conflict becomes known. Also, a written memorandum of voting conflict must be filed with the meeting's recording officer within 15 days of the disclosure being made and must be provided to the other members of the agency, with the disclosure being read publicly at the next scheduled meeting. [Sec. 112.3143, Fla. Stat.]

F. DISCLOSURES

Conflicts of interest may occur when public officials are in a position to make decisions that affect their personal financial interests. This is why public officers and employees, as well as candidates who run for public office, are required to publicly disclose their financial interests. The disclosure process serves to remind officials of their obligation to put the public interest above personal considerations. It also helps citizens to monitor the considerations of those who spend their tax dollars and participate in public policy decisions or administration.

All public officials and candidates do not file the same degree of disclosure; nor do they all file at the same time or place. Thus, care must be taken to determine which disclosure forms a particular official or candidate is required to file.

The following forms are described below to set forth the requirements of the various disclosures and the steps for correctly providing the information in a timely manner.

1. *FORM 1 - Limited Financial Disclosure*

Who Must File:

Persons required to file FORM 1 include all state officers, local officers, candidates for local elective office, and specified state employees as defined below (other than those officers who are required by law to file FORM 6).

STATE OFFICERS include:

- 1) Elected public officials not serving in a political subdivision of the state and any person appointed to fill a vacancy in such office, unless required to file full disclosure on Form 6.
- 2) Appointed members of each board, commission, authority, or council having statewide jurisdiction, excluding members of solely advisory bodies; but including judicial nominating commission members; directors of Enterprise Florida, Scripps Florida Funding Corporation, and CareerSource Florida, and members of the Council on the Social Status of Black Men and Boys; the Executive Director, governors, and senior managers of Citizens Property Insurance Corporation; governors and senior managers of Florida Workers' Compensation Joint Underwriting Association, board members of the Northeast Florida Regional Transportation Commission, and members of the board of Triumph Gulf Coast, Inc.; members of the board of Florida is

for Veterans, Inc.; and members of the Technology Advisory Council within the Agency for State Technology.

- 3) The Commissioner of Education, members of the State Board of Education, the Board of Governors, local boards of trustees and presidents of state universities, and members of the Florida Prepaid College Board.

LOCAL OFFICERS include:

- 1) Persons elected to office in any political subdivision (such as municipalities, counties, and special districts) and any person appointed to fill a vacancy in such office, unless required to file full disclosure on Form 6.
- 2) Appointed members of the following boards, councils, commissions, authorities, or other bodies of any county, municipality, school district, independent special district, or other political subdivision: the governing body of the subdivision; a community college or junior college district board of trustees; a board having the power to enforce local code provisions; a planning or zoning board, board of adjustments or appeals, community redevelopment agency board, or other board having the power to recommend, create, or modify land planning or zoning within the political subdivision, except for citizen advisory committees, technical coordinating committees, and similar groups who only have the power to make recommendations to planning or zoning boards, except for representatives of a military installation acting on behalf of all military installations within that jurisdiction; a pension board or retirement board empowered to invest pension or retirement funds or to determine entitlement to or amount of a pension or other retirement benefit.
- 3) Any other appointed member of a local government board who is required to file a statement of financial interests by the appointing authority or the enabling legislation, ordinance, or resolution creating the board.
- 4) Persons holding any of these positions in local government: county or city manager; chief administrative employee or finance director of a county, municipality, or other

political subdivision; county or municipal attorney; chief county or municipal building inspector; county or municipal water resources coordinator; county or municipal pollution control director; county or municipal environmental control director; county or municipal administrator with power to grant or deny a land development permit; chief of police; fire chief; municipal clerk; appointed district school superintendent; community college president; district medical examiner; purchasing agent (regardless of title) having the authority to make any purchase exceeding \$35,000 for the local governmental unit.

- 5) Members of governing boards of charter schools operated by a city or other public entity.
- 6) The officers, directors, and chief executive officer of a corporation, partnership, or other business entity that is serving as the chief administrative or executive officer or employee of a political subdivision, and any business entity employee who is acting as the chief administrative or executive officer or employee of the political subdivision. [Sec. 112.3136, Fla. Stat.]

SPECIFIED STATE EMPLOYEE includes:

- 1) Employees in the Office of the Governor or of a Cabinet member who are exempt from the Career Service System, excluding secretarial, clerical, and similar positions.
- 2) The following positions in each state department, commission, board, or council: secretary or state surgeon general, assistant or deputy secretary, executive director, assistant or deputy executive director, and anyone having the power normally conferred upon such persons, regardless of title.
- 3) The following positions in each state department or division: director, assistant or deputy director, bureau chief, assistant bureau chief, and any person having the power normally conferred upon such persons, regardless of title.

- 4) Assistant state attorneys, assistant public defenders, criminal conflict and civil regional counsel, assistant criminal conflict and civil regional counsel, public counsel, full-time state employees serving as counsel or assistant counsel to a state agency, judges of compensation claims, administrative law judges, and hearing officers.
- 5) The superintendent or director of a state mental health institute established for training and research in the mental health field, or any major state institution or facility established for corrections, training, treatment, or rehabilitation.
- 6) State agency business managers, finance and accounting directors, personnel officers, grant coordinators, and purchasing agents (regardless of title) with power to make a purchase exceeding \$35,000.
- 7) The following positions in legislative branch agencies: each employee (other than those employed in maintenance, clerical, secretarial, or similar positions and legislative assistants exempted by the presiding officer of their house); and each employee of the Commission on Ethics.

What Must Be Disclosed:

FORM 1 requirements are set forth fully on the form. In general, this includes the reporting person's sources and types of financial interests, such as the names of employers and addresses of real property holdings. NO DOLLAR VALUES ARE REQUIRED TO BE LISTED. In addition, the form requires the disclosure of certain relationships with, and ownership interests in, specified types of businesses such as banks, savings and loans, insurance companies, and utility companies.

When to File:

CANDIDATES who do not currently hold a position requiring the filing of a Form 1 or Form 6 must register and use the electronic filing system to complete the Form 6, then print and file the disclosure with the officer before whom they qualify at the time of qualifying. [Art. II, Sec. 8(a) and (i), Fla. Const., and Sec. 112.3144, Fla. Stat.]

STATE and LOCAL OFFICERS and SPECIFIED STATE EMPLOYEES are required to file disclosure by July 1 of each year. They also must file within thirty days from the date of appointment or the beginning of employment. Those appointees requiring Senate confirmation must file prior to confirmation.

Where to File:

File with the Commission on Ethics. [Sec. 112.3145, Fla. Stat.]

Beginning January 1, 2024, all Form 1 disclosures must be filed electronically through the Commission's electronic filing system. These disclosures will be published and searchable by name or organization on the Commission's website.

2. *FORM 1F - Final Form 1 Limited Financial Disclosure*

FORM 1F is the disclosure form required to be filed within 60 days after a public officer or employee required to file FORM 1 leaves his or her public position. The form covers the disclosure period between January 1 and the last day of office or employment within that year.

3. *FORM 2 - Quarterly Client Disclosure*

The state officers, local officers, and specified state employees listed above, as well as elected constitutional officers, must file a FORM 2 if they or a partner or associate of their professional firm represent a client for compensation before an agency at their level of government.

A FORM 2 disclosure includes the names of clients represented by the reporting person or by any partner or associate of his or her professional firm for a fee or commission before agencies at the reporting person's level of government. Such representations do not include appearances in ministerial matters, appearances before judges of compensation claims, or representations on behalf of one's agency in one's official capacity. Nor does the term include the preparation and filing of forms and applications merely for the purpose of obtaining or transferring a license, so long as the

issuance of the license does not require a variance, special consideration, or a certificate of public convenience and necessity.

When to File:

This disclosure should be filed quarterly, by the end of the calendar quarter following the calendar quarter during which a reportable representation was made. FORM 2 need not be filed merely to indicate that no reportable representations occurred during the preceding quarter; it should be filed ONLY when reportable representations were made during the quarter.

Where To File:

File with the Commission on Ethics. [Sec. 112.3145(4), Fla. Stat.]

Beginning January 1, 2024, all Form 2 disclosures must be filed electronically through the Commission's electronic filing system. These disclosures will be published and searchable on the Commission's website.

4. *FORM 6 - Full and Public Disclosure*

Who Must File:

Persons required by law to file FORM 6 include all elected constitutional officers and candidates for such office; the mayor and members of a city council and candidates for these offices; the Duval County Superintendent of Schools; judges of compensation claims (pursuant to Sec. 440.442, Fla. Stat.); members of the Florida Housing Finance Corporation Board and members of expressway authorities, transportation authorities (except the Jacksonville Transportation Authority), bridge authority, or toll authorities created pursuant to Ch. 348 or 343, or 349, or other general law.

What Must be Disclosed:

FORM 6 is a detailed disclosure of assets, liabilities, and sources of income over \$1,000 and their values, as well as net worth. Officials may opt to file their most recent income tax return in lieu of listing sources of income but still must disclose their assets, liabilities, and net worth. In addition, the form requires the disclosure of certain relationships with, and ownership interests in, specified types of businesses such as banks, savings and loans, insurance companies, and utility companies.

When and Where To File:

Officials must file FORM 6 annually by July 1 with the Commission on Ethics.

Beginning January 1, 2023, all Form 6 disclosures must be filed electronically through the Commission's electronic filing system. These disclosures will be published and searchable by name and organization on the Commission's website.

CANDIDATES who do not currently hold a position requiring the filing of a Form 1 or Form 6 must register and use the electronic filing system to complete the Form 6, then print and file the disclosure with the officer before whom they qualify at the time of qualifying. [Art. II, Sec. 8(a) and (i), Fla. Const., and Sec. 112.3144, Fla. Stat.]

5. *FORM 6F - Final Form 6 Full and Public Disclosure*

This is the disclosure form required to be filed within 60 days after a public officer or employee required to file FORM 6 leaves his or her public position. The form covers the disclosure period between January 1 and the last day of office or employment within that year.

6. *FORM 9 - Quarterly Gift Disclosure*

Each person required to file FORM 1 or FORM 6, and each state procurement employee, must file a FORM 9, Quarterly Gift Disclosure, with the Commission on Ethics on the last day of any calendar quarter following the calendar quarter in which he or she received a gift worth more than \$100, other

than gifts from relatives, gifts prohibited from being accepted, gifts primarily associated with his or her business or employment, and gifts otherwise required to be disclosed. FORM 9 NEED NOT BE FILED if no such gift was received during the calendar quarter.

Information to be disclosed includes a description of the gift and its value, the name and address of the donor, the date of the gift, and a copy of any receipt for the gift provided by the donor. [Sec. 112.3148, Fla. Stat.]

7. *FORM 10 - Annual Disclosure of Gifts from Government Agencies and Direct-Support Organizations and Honorarium Event Related Expenses*

State government entities, airport authorities, counties, municipalities, school boards, water management districts, and the South Florida Regional Transportation Authority, may give a gift worth more than \$100 to a person required to file FORM 1 or FORM 6, and to state procurement employees, if a public purpose can be shown for the gift. Also, a direct-support organization for a governmental entity may give such a gift to a person who is an officer or employee of that entity. These gifts are to be reported on FORM 10, to be filed by July 1.

The governmental entity or direct-support organization giving the gift must provide the officer or employee with a statement about the gift no later than March 1 of the following year. The officer or employee then must disclose this information by filing a statement by July 1 with his or her annual financial disclosure that describes the gift and lists the donor, the date of the gift, and the value of the total gifts provided during the calendar year. State procurement employees file their statements with the Commission on Ethics. [Sec. 112.3148, Fla. Stat.]

In addition, a person required to file FORM 1 or FORM 6, or a state procurement employee, who receives expenses or payment of expenses related to an honorarium event from someone who is prohibited from giving him or her an honorarium, must disclose annually the name, address, and affiliation of the donor, the amount of the expenses, the date of the event, a description of the expenses paid or provided, and the total value of the expenses on FORM 10. The donor paying the expenses must provide the officer or employee with a statement about the expenses within 60 days of the honorarium event.

The disclosure must be filed by July 1, for expenses received during the previous calendar year, with the officer's or employee's FORM 1 or FORM 6. State procurement employees file their statements with the Commission on Ethics. [Sec. 112.3149, Fla. Stat.]

However, notwithstanding Sec. 112.3149, Fla. Stat., no executive branch or legislative lobbyist or principal shall make, directly or indirectly, and no executive branch agency official or employee who files FORM 1 or FORM 6 shall knowingly accept, directly or indirectly, any expenditure made for the purpose of lobbying. This may include gifts or honorarium event related expenses that formerly were permitted under Sections 112.3148 and 112.3149. [Sec. 112.3215, Fla. Stat.] Similar prohibitions apply to legislative officials and employees. However, these laws are not administered by the Commission on Ethics. [Sec. 11.045, Fla. Stat.] In addition, gifts, which include anything not primarily related to political activities authorized under ch. 106, are prohibited from political committees. [Sec. 112.31485 Fla. Stat.]

8. *FORM 30 - Donor's Quarterly Gift Disclosure*

As mentioned above, the following persons and entities generally are prohibited from giving a gift worth more than \$100 to a reporting individual (a person required to file FORM 1 or FORM 6) or to a state procurement employee: a political committee; a lobbyist who lobbies the reporting individual's or procurement employee's agency, and the partner, firm, employer, or principal of such a lobbyist; and vendors. If such person or entity makes a gift worth between \$25 and \$100 to a reporting individual or state procurement employee (that is not accepted in behalf of a governmental entity or charitable organization), the gift should be reported on FORM 30. The donor also must notify the recipient at the time the gift is made that it will be reported.

The FORM 30 should be filed by the last day of the calendar quarter following the calendar quarter in which the gift was made. If the gift was made to an individual in the legislative branch, FORM 30 should be filed with the Lobbyist Registrar. [See page 35 for address.] If the gift was to any other reporting individual or state procurement employee, FORM 30 should be filed with the Commission on Ethics.

However, notwithstanding Section 112.3148, Fla. Stat., no executive branch lobbyist or principal shall make, directly or indirectly, and no executive branch agency official or employee who files FORM 1 or FORM 6 shall knowingly accept, directly or indirectly, any expenditure made for the purpose of lobbying. This may include gifts that formerly were permitted under Section 112.3148. [Sec. 112.3215, Fla. Stat.] Similar prohibitions apply to legislative officials and employees. However, these laws are not administered by the Commission on Ethics. [Sec. 11.045, Fla. Stat.] In addition, gifts from political committees are prohibited. [Sec. 112.31485, Fla. Stat.]

9. *FORM 1X AND FORM 6X - Amendments to Form 1 and Form 6*

These forms are provided for officers or employees to amend their previously filed Form 1 or Form 6.

IV. AVAILABILITY OF FORMS

Beginning January 1, 2024, LOCAL OFFICERS and EMPLOYEES, and OTHER STATE OFFICERS, and SPECIFIED STATE EMPLOYEES who must file FORM 1 annually must file electronically via the Commission's Electronic Financial Disclosure Management System (EFDMS). Paper forms will not be promulgated. Communications regarding the annual filing requirement will be sent via email to filers no later than June 1. Filers must maintain an updated email address in their User Profile in EFDMS.

ELECTED CONSTITUTIONAL OFFICERS and other officials who must file Form 6 annually, including City Commissioners and Mayors, must file electronically via the Commission's Electronic Financial Disclosure Management System (EFDMS). Paper forms will not be promulgated. Communications regarding the annual filing requirement will be sent via email to filers no later than June 1. Filers must maintain an updated email address in their User Profile in EFDMS.

V. PENALTIES

A. *Non-criminal Penalties for Violation of the Sunshine Amendment and the Code of Ethics*

There are no criminal penalties for violation of the Sunshine Amendment and the Code of Ethics. Penalties for violation of these laws may include: impeachment, removal from office or employment, suspension, public censure, reprimand, demotion, reduction in salary level, forfeiture of no more than one-third salary per month for no more than twelve months, a civil penalty not to exceed \$10,000*, and restitution of any pecuniary benefits received, and triple the value of a gift from a political committee.

B. *Penalties for Candidates*

CANDIDATES for public office who are found in violation of the Sunshine Amendment or the Code of Ethics may be subject to one or more of the following penalties: disqualification from being on the ballot, public censure, reprimand, or a civil penalty not to exceed \$10,000*, and triple the value of a gift received from a political committee.

C. *Penalties for Former Officers and Employees*

FORMER PUBLIC OFFICERS or EMPLOYEES who are found in violation of a provision applicable to former officers or employees or whose violation occurred prior to such officer's or employee's leaving public office or employment may be subject to one or more of the following penalties: public censure and reprimand, a civil penalty not to exceed \$10,000*, and restitution of any pecuniary benefits received, and triple the value of a gift received from a political committee.

*Conduct occurring after May 11, 2023, will be subject to a recommended civil penalty of up to \$20,000. [Ch. 2023-49, Laws of Florida.]

D. Penalties for Lobbyists and Others

An executive branch lobbyist who has failed to comply with the Executive Branch Lobbying Registration law (see Part VIII) may be fined up to \$5,000, reprimanded, censured, or prohibited from lobbying executive branch agencies for up to two years. Lobbyists, their employers, principals, partners, and firms, and political committees and committees of continuous existence who give a prohibited gift or honorarium or fail to comply with the gift reporting requirements for gifts worth between \$25 and \$100, may be penalized by a fine of not more than \$5,000 and a prohibition on lobbying, or employing a lobbyist to lobby, before the agency of the public officer or employee to whom the gift was given for up to two years. Any agent or person acting on behalf of a political committee giving a prohibited gift is personally liable for a civil penalty of up to triple the value of the gift.

Executive Branch lobbying firms that fail to timely file their quarterly compensation reports may be fined \$50 per day per report for each day the report is late, up to a maximum fine of \$5,000 per report.

E. Felony Convictions: Forfeiture of Retirement Benefits

Public officers and employees are subject to forfeiture of all rights and benefits under the retirement system to which they belong if convicted of certain offenses. The offenses include embezzlement or theft of public funds; bribery; felonies specified in Chapter 838, Florida Statutes; impeachable offenses; and felonies committed with intent to defraud the public or their public agency. [Sec. 112.3173, Fla. Stat.]

F. Automatic Penalties for Failure to File Annual Disclosure

Public officers and employees required to file either Form 1 or Form 6 annual financial disclosure are subject to automatic fines of \$25 for each day late the form is filed after September 1, up to a maximum penalty of \$1,500. [Sec. 112.3144 and 112.3145, Fla. Stat.]

VI. ADVISORY OPINIONS

Conflicts of interest may be avoided by greater awareness of the ethics laws on the part of public officials and employees through advisory assistance from the Commission on Ethics.

A. *Who Can Request an Opinion*

Any public officer, candidate for public office, or public employee in Florida who is in doubt about the applicability of the standards of conduct or disclosure laws to himself or herself, or anyone who has the power to hire or terminate another public employee, may seek an advisory opinion from the Commission about himself or herself or that employee.

B. *How to Request an Opinion*

Opinions may be requested by letter presenting a question based on a real situation and including a detailed description of the situation. Opinions are issued by the Commission and are binding on the conduct of the person who is the subject of the opinion, unless material facts were omitted or misstated in the request for the opinion. Published opinions will not bear the name of the persons involved unless they consent to the use of their names; however, the request and all information pertaining to it is a public record, made available to the Commission and to members of the public in advance of the Commission's consideration of the question.

C. *How to Obtain Published Opinions*

All of the Commission's opinions are available for viewing or download at its website:
www.ethics.state.fl.us.

VII. COMPLAINTS

A. *Citizen Involvement*

The Commission on Ethics cannot conduct investigations of alleged violations of the Sunshine Amendment or the Code of Ethics unless a person files a sworn complaint with the Commission alleging such violation has occurred, or a referral is received, as discussed below.

If you have knowledge that a person in government has violated the standards of conduct or disclosure laws described above, you may report these violations to the Commission by filing a sworn complaint on the form prescribed by the Commission and available for download at www.ethics.state.fl.us. The Commission is unable to take action based on learning of such misdeeds through newspaper reports, telephone calls, or letters.

You can download a complaint form (FORM 50) from the Commission's website: www.ethics.state.fl.us, or contact the Commission office at the address or phone number shown on the inside front cover of this booklet.

B. *Referrals*

The Commission may accept referrals from: the Governor, the Florida Department of Law Enforcement, a State Attorney, or a U.S. Attorney. A vote of six of the Commission's nine members is required to proceed on such a referral.

C. *Confidentiality*

The complaint or referral, as well as all proceedings and records relating thereto, is confidential until the accused requests that such records be made public or until the matter reaches a stage in the Commission's proceedings where it becomes public. This means that unless the Commission receives a written waiver of confidentiality from the accused, the Commission is not free to release any documents or to comment on a complaint or referral to members of the public or press, so long as the complaint or referral remains in a confidential stage.

A COMPLAINT OR REFERRAL MAY NOT BE FILED WITH RESPECT TO A CANDIDATE ON THE DAY OF THE ELECTION, OR WITHIN THE 30 CALENDAR DAYS PRECEDING THE ELECTION DATE, UNLESS IT IS BASED ON PERSONAL INFORMATION OR INFORMATION OTHER THAN HEARSAY.

D. How the Complaint Process Works

Complaints which allege a matter within the Commission's jurisdiction are assigned a tracking number and Commission staff forwards a copy of the original sworn complaint to the accused within five working days of its receipt. Any subsequent sworn amendments to the complaint also are transmitted within five working days of their receipt.

Once a complaint is filed, it goes through three procedural stages under the Commission's rules. The first stage is a determination of whether the allegations of the complaint are legally sufficient: that is, whether they indicate a possible violation of any law over which the Commission has jurisdiction. If the complaint is found not to be legally sufficient, the Commission will order that the complaint be dismissed without investigation, and all records relating to the complaint will become public at that time.

In cases of very minor financial disclosure violations, the official will be allowed an opportunity to correct or amend his or her disclosure form. Otherwise, if the complaint is found to be legally sufficient, a preliminary investigation will be undertaken by the investigative staff of the Commission. The second stage of the Commission's proceedings involves this preliminary investigation and a decision by the Commission as to whether there is probable cause to believe that there has been a violation of any of the ethics laws. If the Commission finds no probable cause to believe there has been a violation of the ethics laws, the complaint will be dismissed and will become a matter of public record. If the Commission finds probable cause to believe there has been a violation of the ethics laws, the complaint becomes public and usually enters the third stage of proceedings. This stage requires the Commission to decide whether the law was actually violated and, if so, whether a penalty should be recommended. At this stage, the accused has the right to request a public hearing (trial) at which evidence is presented, or the Commission may order that such a hearing be held. Public hearings usually are held in or near the area where the alleged violation occurred.

When the Commission concludes that a violation has been committed, it issues a public report of its findings and may recommend one or more penalties to the appropriate disciplinary body or official.

When the Commission determines that a person has filed a complaint with knowledge that the complaint contains one or more false allegations or with reckless disregard for whether the complaint contains false allegations, the complainant will be liable for costs plus reasonable attorney's fees incurred by the person complained against. The Department of Legal Affairs may bring a civil action to recover such fees and costs, if they are not paid voluntarily within 30 days.

E. Dismissal of Complaints At Any Stage of Disposition

The Commission may, at its discretion, dismiss any complaint at any stage of disposition should it determine that the public interest would not be served by proceeding further, in which case the Commission will issue a public report stating with particularity its reasons for the dismissal. [Sec. 112.324(12), Fla. Stat.]

F. Statute of Limitations

All sworn complaints alleging a violation of the Sunshine Amendment or the Code of Ethics must be filed with the Commission within five years of the alleged violation or other breach of the public trust. Time starts to run on the day AFTER the violation or breach of public trust is committed. The statute of limitations is tolled on the day a sworn complaint is filed with the Commission. If a complaint is filed and the statute of limitations has run, the complaint will be dismissed. [Sec. 112.3231, Fla. Stat.]

VIII. EXECUTIVE BRANCH LOBBYING

Any person who, for compensation and on behalf of another, lobbies an agency of the executive branch of state government with respect to a decision in the area of policy or procurement may be required to register as an executive branch lobbyist. Registration is required before lobbying an agency and is renewable annually. In addition, each lobbying firm must file a compensation report

with the Commission for each calendar quarter during any portion of which one or more of the firm's lobbyists were registered to represent a principal. As noted above, no executive branch lobbyist or principal can make, directly or indirectly, and no executive branch agency official or employee who files FORM 1 or FORM 6 can knowingly accept, directly or indirectly, **any expenditure** made for the purpose of lobbying. [Sec. 112.3215, Fla. Stat.]

Paying an executive branch lobbyist a contingency fee based upon the outcome of any specific executive branch action, and receiving such a fee, is prohibited. A violation of this prohibition is a first degree misdemeanor, and the amount received is subject to forfeiture. This does not prohibit sales people from receiving a commission. [Sec. 112.3217, Fla. Stat.]

Executive branch departments, state universities, community colleges, and water management districts are prohibited from using public funds to retain an executive branch (or legislative branch) lobbyist, although these agencies may use full-time employees as lobbyists. [Sec. 11.062, Fla. Stat.]

Online registration and filing is available at www.floridalobbyist.gov. Additional information about the executive branch lobbyist registration system may be obtained by contacting the Lobbyist Registrar at the following address:

Executive Branch Lobbyist Registration
Room G-68, Claude Pepper Building
111 W. Madison Street
Tallahassee, FL 32399-1425
Phone: 850/922-4990

IX. WHISTLE-BLOWER'S ACT

In 1986, the Legislature enacted a "Whistle-blower's Act" to protect employees of agencies and government contractors from adverse personnel actions in retaliation for disclosing information in a sworn complaint alleging certain types of improper activities. Since then, the Legislature has revised this law to afford greater protection to these employees.

While this language is contained within the Code of Ethics, the Commission has no jurisdiction or authority to proceed against persons who violate this Act. Therefore, a person who has disclosed information alleging improper conduct governed by this law and who may suffer adverse consequences as a result should contact one or more of the following: the Office of the Chief Inspector General in the Executive Office of the Governor; the Department of Legal Affairs; the Florida Commission on Human Relations; or a private attorney. [Sec. 112.3187 - 112.31895, Fla. Stat.]

X. ADDITIONAL INFORMATION

As mentioned above, we suggest that you review the language used in each law for a more detailed understanding of Florida's ethics laws. The "Sunshine Amendment" is Article II, Section 8, of the Florida Constitution. The Code of Ethics for Public Officers and Employees is contained in Part III of Chapter 112, Florida Statutes.

Additional information about the Commission's functions and interpretations of these laws may be found in Chapter 34 of the Florida Administrative Code, where the Commission's rules are published, and in The Florida Administrative Law Reports, which until 2005 published many of the Commission's final orders. The Commission's rules, orders, and opinions also are available at www.ethics.state.fl.us.

If you are a public officer or employee concerned about your obligations under these laws, the staff of the Commission will be happy to respond to oral and written inquiries by providing information about the law, the Commission's interpretations of the law, and the Commission's procedures.

XI. TRAINING

Constitutional officers, elected municipal officers, commissioners of community redevelopment agencies (CRAs), and commissioners of community development districts are required to receive a total of four hours training, per calendar year, in the area of ethics, public

records, and open meetings. The Commission on Ethics does not track compliance or certify providers. Officials indicate their compliance with the training requirement when they file their annual Form 1 or Form 6.

Visit the training page on the Commission's website for up-to-date rules, opinions, audio/video training, and opportunities for live training conducted by Commission staff.

2023 Form 1 - Statement of Financial Interests

General Information

Name: DISCLOSURE FILER

Address: SAMPLE ADDRESS

County: SAMPLE COUNTY

PID SAMPLE

AGENCY INFORMATION

Organization	Suborganization	Title
SAMPLE	SAMPLE	SAMPLE

Disclosure Period

THIS STATEMENT REFLECTS YOUR FINANCIAL INTERESTS FOR CALENDAR YEAR ENDING DECEMBER 31, 2023 .

Primary Sources of Income

PRIMARY SOURCE OF INCOME (Over \$2,500) (Major sources of income to the reporting person)
(If you have nothing to report, write "none" or "n/a")

Name of Source of Income	Source's Address	Description of the Source's Principal Business Activity

Secondary Sources of Income

SECONDARY SOURCES OF INCOME (Major customers, clients, and other sources of income to businesses owned by the reporting person) (If you have nothing to report, write "none" or "n/a")

Name of Business Entity	Name of Major Sources of Business' Income	Address of Source	Principal Business Activity of Source

Real Property

REAL PROPERTY (Land, buildings owned by the reporting person) (If you have nothing to report, write "none" or "n/a")

Location/Description

Intangible Personal Property

INTANGIBLE PERSONAL PROPERTY (Stocks, bonds, certificates of deposit, etc. over \$10,000) (If you have nothing to report, write "none" or "n/a")

Type of Intangible	Business Entity to Which the Property Relates

E-FILING SAMPLE

2023 Form 1 - Statement of Financial Interests

Liabilities

LIABILITIES (Major debts valued over \$10,000):
(If you have nothing to report, write "none" or "n/a")

Name of Creditor	Address of Creditor

Interests in Specified Businesses

INTERESTS IN SPECIFIED BUSINESSES (Ownership or positions in certain types of businesses)
(If you have nothing to report, write "none" or "n/a")

Business Entity # 1

Training

Based on the office or position you hold, the certification of training required under Section 112.3142, F.S., is not applicable to you for this form year.

E-FILED SAMPLE

Signature of Filer

Digitally signed:

Filed with COE:

E-FILING SAMPLE

2023 Form 1 Instructions

Statement of Financial Interests

Notice

The annual Statement of Financial Interest is due July 1, 2024. If the annual form is not submitted via the electronic filing system created and maintained by the Commission September 3, 2024, an automatic fine of \$25 for each day late will be imposed, up to a maximum penalty of \$1,500. Failure to file also can result in removal from public office or employment. [s. 112.3145, F.S.]

In addition, failure to make any required disclosure constitutes grounds for and may be punished by one or more of the following: disqualification from being on the ballot, impeachment, removal or suspension from office or employment, demotion, reduction in salary, reprimand, or a civil penalty not exceeding \$10,000. [s. 112.317, F.S.]

When To File:

Initially, each local officer/employee, state officer, and specified state employee must file within 30 days of the date of his or her appointment or of the beginning of employment. Appointees who must be confirmed by the Senate must file prior to confirmation, even if that is less than 30 days from the date of their appointment.

Candidates must file at the same time they file their qualifying papers.

Thereafter, file by July 1 following each calendar year in which they hold their positions.

Finally, file a final disclosure form (Form 1F) within 60 days of leaving office or employment. Filing a CE Form 1F (Final Statement of Financial Interests) does not relieve the filer of filing a CE Form 1 if the filer was in his or her position on December 31, 2023.

Who Must File Form 1

1. Elected public officials not serving in a political subdivision of the state and any person appointed to fill a vacancy in such office, unless required to file full disclosure on Form 6.
2. Appointed members of each board, commission, authority, or council having statewide jurisdiction, excluding those required to file full disclosure on Form 6 as well as members of solely advisory bodies, but including judicial nominating commission members; Directors of Enterprise Florida, Scripps Florida Funding Corporation, and Career Source Florida; and members of the Council on the Social Status of Black Men and Boys; the Executive Director, Governors, and senior managers of Citizens Property Insurance Corporation; Governors and senior managers of Florida Workers' Compensation Joint Underwriting Association; board members of the Northeast Fla. Regional Transportation Commission; board members of Triumph Gulf Coast, Inc; board members of Florida Is For Veterans, Inc.; and members of the Technology Advisory Council within the Agency for State Technology.
3. The Commissioner of Education, members of the State Board of Education, the Board of Governors, the local Boards of Trustees and Presidents of state universities, and the Florida Prepaid College Board.
4. Persons elected to office in any political subdivision (such as municipalities, counties, and special districts) and any person appointed to fill a vacancy in such office, unless required to file Form 6.
5. Appointed members of the following boards, councils, commissions, authorities, or other bodies of county, municipality, school district, independent special district, or other political subdivision: the governing body of the subdivision; community college or junior college district boards of trustees; boards having the power to enforce local code provisions; boards of adjustment; community redevelopment agencies; planning or zoning boards having the power to recommend, create, or modify land planning or zoning within a political subdivision, except for citizen advisory committees, technical coordinating committees, and similar groups who only have the power to make recommendations to planning or zoning boards, and except for representatives of a military installation acting on behalf of all military installations within that jurisdiction; pension or retirement boards empowered to invest pension or retirement funds or determine entitlement to or amount of pensions or other retirement benefits, and the Pinellas County Construction Licensing Board.
6. Any appointed member of a local government board who is required to file a statement of financial interests by the appointing authority or the enabling legislation, ordinance, or resolution creating the board.
7. Persons holding any of these positions in local government: county or city manager; chief administrative employee or finance director of a county, municipality, or other political subdivision; county or municipal attorney; chief county or municipal building inspector; county or municipal water resources coordinator; county or municipal pollution control director; county or municipal environmental control director; county or municipal administrator with power to grant or deny a land development permit; chief of police; fire chief; municipal clerk;

appointed district school superintendent; community college president; district medical examiner; purchasing agent (regardless of title) having the authority to make any purchase exceeding \$35,000 for the local governmental unit.

8. Officers and employees of entities serving as chief administrative officer of a political subdivision.
9. Members of governing boards of charter schools operated by a city or other public entity.
10. Employees in the office of the Governor or of a Cabinet member who are exempt from the Career Service System, excluding secretarial, clerical, and similar positions.
11. The following positions in each state department, commission, board, or council: Secretary, Assistant or Deputy Secretary, Executive Director, Assistant or Deputy Executive Director, and anyone having the power normally conferred upon such persons, regardless of title.
12. The following positions in each state department or division: Director, Assistant or Deputy Director, Bureau Chief, and any person having the power normally conferred upon such persons, regardless of title.
13. Assistant State Attorneys, Assistant Public Defenders, criminal conflict and civil regional counsel, and assistant criminal conflict and civil regional counsel, Public Counsel, full-time state employees serving as counsel or assistant counsel to a state agency, administrative law judges, and hearing officers.
14. The Superintendent or Director of a state mental health institute established for training and research in the mental health field, or any major state institution or facility established for corrections, training, treatment, or rehabilitation.
15. State agency Business Managers, Finance and Accounting Directors, Personnel Officers, Grant Coordinators, and purchasing agents (regardless of title) with power to make a purchase exceeding \$35,000.
16. The following positions in legislative branch agencies: each employee (other than those employed in maintenance, clerical, secretarial, or similar positions and legislative assistants exempted by the presiding officer of their house); and each employee of the Commission on Ethics.
17. Each member of the governing body of a "large-hub commercial service airport," as defined in Section 112.3144(1)(c), Florida Statutes, except for members required to comply with the financial disclosure requirements of s. 8, Article II of the State Constitution.

ATTACHMENTS: A filer may include and submit attachments or other supporting documentation when filing disclosure.

PUBLIC RECORD: The disclosure form is a public record and is required by law to be posted to the Commission's website. Your Social Security number, bank account, debit, charge, and credit card numbers, mortgage or brokerage account numbers, personal identification numbers, or taxpayer identification numbers are not required and should not be included. If such information is included in the filing, it may be made available for public inspection and copying unless redaction is required by the filer, without any liability to the Commission. If you are an active or former officer or employee listed in Section 119.071, F.S., whose home address or other information is exempt from disclosure, the Commission will maintain that confidentiality *if you submit a written and notarized request.*

QUESTIONS about this form or the ethics laws may be addressed to the Commission on Ethics, Post Office Drawer 15709, Tallahassee, Florida 32317-5709; physical address: 325 John Knox Road, Building E, Suite 200, Tallahassee, FL 32303; telephone (850) 488-7864.

Instructions for Completing Form 1

Primary Sources of Income

[Required by s. 112.3145(3)(b)1, F.S.]

This section is intended to require the disclosure of your principal sources of income during the disclosure period. You do not have to disclose any public salary or public position(s). The income of your spouse need not be disclosed; however, if there is joint income to you and your spouse from property you own jointly (such as interest or dividends from a bank account or stocks), you should disclose the source of that income if it exceeded the threshold.

Please list in this part of the form the name, address, and principal business activity of each source of your income which exceeded \$2,500 of gross income received by you in your own name or by any other person for your use or benefit.

"Gross income" means the same as it does for income tax purposes, even if the income is not actually taxable, such as interest on tax-free bonds. Examples include: compensation for services, income from business, gains from property dealings, interest, rents, dividends, pensions, IRA distributions, social security, distributive share of partnership gross income, and alimony if considered gross income under federal law, but not child support.

Examples:

- If you were employed by a company that manufactures computers and received more than \$2,500, list the name of the company, its address, and its principal business activity (computer manufacturing).

- If you were a partner in a law firm and your distributive share of partnership gross income exceeded \$2,500, list the name of the firm, its address, and its principal business activity (practice of law).
- If you were the sole proprietor of a retail gift business and your gross income from the business exceeded \$2,500, list the name of the business, its address, and its principal business activity (retail gift sales).
- If you received income from investments in stocks and bonds, list each individual company from which you derived more than \$2,500. Do not aggregate all of your investment income.
- If more than \$2,500 of your gross income was gain from the sale of property (not just the selling price), list as a source of income the purchaser's name, address and principal business activity. If the purchaser's identity is unknown, such as where securities listed on an exchange are sold through a brokerage firm, the source of income should be listed as "sale of (name of company) stock," for example.
- If more than \$2,500 of your gross income was in the form of interest from one particular financial institution (aggregating interest from all CD's, accounts, etc., at that institution), list the name of the institution, its address, and its principal business activity.

Secondary Sources of Income

[Required by s. 112.3145(3)(b)2, F.S.]

This part is intended to require the disclosure of major customers, clients, and other sources of income to businesses in which you own an interest. It is not for reporting income from second jobs. That kind of income should be reported in "Primary Sources of Income," if it meets the reporting threshold. You will not have anything to report unless, during the disclosure period:

1. You owned (either directly or indirectly in the form of an equitable or beneficial interest) more than 5% of the total assets or capital stock of a business entity (a corporation, partnership, LLC, limited partnership, proprietorship, joint venture, trust, firm, etc., doing business in Florida); *and*,
2. You received more than \$5,000 of your gross income during the disclosure period from that business entity.

If your interests and gross income exceeded these thresholds, then for that business entity you must list every source of income to the business entity which exceeded 10% of the business entity's gross income (computed on the basis of the business entity's most recently completed fiscal year), the source's address, and the source's principal business activity.

Examples:

- You are the sole proprietor of a dry cleaning business, from which you received more than \$5,000. If only one customer, a uniform rental company, provided more than 10% of your dry cleaning business, you must list the name of the uniform rental company, its address, and its principal business activity (uniform rentals).
- You are a 20% partner in a partnership that owns a shopping mall and your partnership income exceeded the above thresholds. List each tenant of the mall that provided more than 10% of the partnership's gross income and the tenant's address and principal business activity.

Real Property

[Required by s. 112.3145(3)(b)3, F.S.]

In this part, list the location or description of all real property in Florida in which you owned directly or indirectly at any time during the disclosure period in excess of 5% of the property's value. You are not required to list your residences. You should list any vacation homes if you derive income from them.

Indirect ownership includes situations where you are a beneficiary of a trust that owns the property, as well as situations where you own more than 5% of a partnership or corporation that owns the property. The value of the property may be determined by the most recently assessed value for tax purposes, in the absence of a more accurate fair market value.

The location or description of the property should be sufficient to enable anyone who looks at the form to identify the property. A street address should be used, if one exists.

Intangible Personal Property

[Required by s. 112.3145(3)(b)3, F.S.]

Describe any intangible personal property that, at any time during the disclosure period, was worth more than \$10,000 and state the business entity to which the property related. Intangible personal property includes things such as cash on hand, stocks, bonds, certificates of deposit, vehicle leases, interests in businesses, beneficial interests in trusts, money owed you (including, but not limited to, loans made as a candidate to your own campaign), Deferred Retirement Option Program (DROP) accounts, the Florida Prepaid College Plan, and bank accounts in which you have an ownership

interest. Intangible personal property also includes investment products held in IRAs, brokerage accounts, and the Florida College Investment Plan. Note that the product contained in a brokerage account, IRA, or the Florida College Investment Plan is your asset—not the account or plan itself. Things like automobiles and houses you own, jewelry, and paintings are not intangible property. Intangibles relating to the same business entity may be aggregated; for example, CDs and savings accounts with the same bank. Property owned as tenants by the entirety or as joint tenants with right of survivorship, including bank accounts owned in such a manner, should be valued at 100%. The value of a leased vehicle is the vehicle's present value minus the lease residual (a number found on the lease document).

Liabilities

[Required by s. 112.3145(3)(b)4, F.S.]

List the name and address of each creditor to whom you owed more than \$10,000 at any time during the disclosure period. The amount of the liability of a vehicle lease is the sum of any past-due payments and all unpaid prospective lease payments. You are not required to list the amount of any debt. You do not have to disclose credit card and retail installment accounts, taxes owed (unless reduced to a judgment), indebtedness on a life insurance policy owed to the company of issuance, or contingent liabilities. A "contingent liability" is one that will become an actual liability only when one or more future events occur or fail to occur, such as where you are liable only as a guarantor, surety, or endorser on a promissory note. If you are a "co-maker" and are jointly liable or jointly and severally liable, then it is not a contingent liability.

Interests in Specified Businesses

[Required by s. 112.3145(7), F.S.]

The types of businesses covered in this disclosure include: state and federally chartered banks; state and federal savings and loan associations; cemetery companies; insurance companies; mortgage companies; credit unions; small loan companies; alcoholic beverage licensees; pari-mutuel wagering companies, utility companies, entities controlled by the Public Service Commission; and entities granted a franchise to operate by either a city or a county government.

Disclose in this part the fact that you owned during the disclosure period an interest in, or held any of certain positions with the types of businesses listed above. You must make this disclosure if you own or owned (either directly or indirectly in the form of an equitable or beneficial interest) at any time during the disclosure period more than 5% of the total assets or capital stock of one of the types of business entities listed above. You also must complete this part of the form for each of these types of businesses for which you are, or were at any time during the disclosure period, an officer, director, partner, proprietor, or agent (other than a resident agent solely for service of process).

If you have or held such a position or ownership interest in one of these types of businesses, list the name of the business, its address and principal business activity, and the position held with the business (if any). If you own(ed) more than a 5% interest in the business, indicate that fact and describe the nature of your interest.

Training Certification

[Required by s. 112.3142, F.S.]

If you are a Constitutional or elected municipal officer appointed school superintendent, a commissioner of a community redevelopment agency created under Part III, Chapter 163, or an elected local officers of independent special districts, including any person appointed to fill a vacancy on an elected special district board, whose service began on or before March 31 of the year for which you are filing, you are required to complete four hours of ethics training which addresses Article II, Section 8 of the Florida Constitution, the Code of Ethics for Public Officers and Employees, and the public records and open meetings laws of the state. You are required to certify on this form that you have taken such training.

MEMO

To: Board of Supervisors

From: James P. Ward

Date: March 13, 2024

Re: Commission on Ethics newly established Electronic Financial Disclosure Management System ("EFDMS") website registration, Financial Disclosure Forms, and Required Ethics Training

Beginning January 1, 2024, the Florida Commission on Ethics has enacted new procedures for electronic filing of Financial Disclosure forms for Public Officials, as a means of submitting Forms and updating your Filer contact information.

To access the newly established Electronic Financial Disclosure Management System ("EFDMS"), visit the login page (<https://disclosure.floridaethics.gov/Account/Login>) and watch the instructional video for directions on how to register/confirm registration.

If you have filed a Form 1 before, click "I am a Filer" and follow the prompts.

Instructions, FAQs, and tutorials are available from the dashboard within EFDMS. Additional assistance can be obtained Monday-Friday from 8:00 a.m. until 5:00 p.m. by contacting the Commission directly.

Financial disclosure forms are due on or before July 1, 2024 for the preceding calendar year. A grace period is in effect until September 1. If the disclosure is not filed or postmarked by September 1, an automatic fine of \$25 per day will begin to accrue and will continue to build until the disclosure is filed, or the fine reaches \$1,500.

If you have an annual filing requirement AND will be running for office as a qualified elector in November, then you will need to complete your disclosure in EFDMS and submit your filing electronically to the Commission, then print a verification/receipt for e-filing your form or print a copy of your disclosure to file with your Qualifying Officer packet.

It is imperative that each filer take the time to confirm their registration on the EFDMS site, in order to ensure that the Florida Commission on Ethics has updated and correct contact information. All communication about filing requirements and due dates for filers will be provided via email only. Filers MUST maintain a current email address in EFDMS. By law, failure to maintain a current email address will not qualify as an "unusual circumstance" during an appeal of an automatic fine for failure to timely file a Form.

If the annual form is not submitted via the electronic filing system created and maintained by the Florida Commission on Ethics by September 3, 2024, an automatic fine of \$25 for each day late will be imposed, up to a maximum penalty of \$1,500. Failure to file also can result in removal from public office [s. 112.3145, F.S.].

In addition, failure to make any required disclosure constitutes grounds for and may be punished by one or more of the following: disqualification from being on the ballot, impeachment, removal or suspension from office, or a civil penalty not exceeding \$10,000. [s. 112.317, F.S.].

Also beginning January 1, 2024, all elected local officers of independent special districts, including any person appointed to fill a vacancy on an elected special district board, whose service began on or before March 31st of the year for which you are filing, are now required to complete four (4) hours of Ethics Training each calendar year. The four (4) hours of Ethics Training shall be allocated amongst the following categories:

- two (2) hours of ethics law,
- one (1) hour of Sunshine Law; and
- one (1) hour of Public Records law.

Please note that the four (4) hours of the Ethics Training do not have to be completed all at once. Supervisors will report their 2024 training when they fill out their Form 1 (Statement of Financial Interests) for the 2025 year by checking a box confirming that they have completed the annual Ethics Training.

It is highly recommended that you keep a record of all ethics training used to satisfy the Ethics Training requirements. At present, there is no need to submit a certificate or letter of completion of the Ethics Training. However, the Florida Commission on Ethics (“COE”) advises that Supervisors maintain a record in the event they are asked to provide proof of completion of all Ethics Training.

Additionally, you may be solicited by a private organization (Florida Association of Special Districts) – to take their Ethics Training Course on their platform for which there is a fee. **You are NOT required to use their services nor pay the fees they charge.** There are several free online resources and links to resources that Supervisors might find helpful, including free training for the two (2) hour ethics portion and links to outside trainings which can be used to satisfy the other categories of the Ethics Training. **You may take training from any source you choose.**

State Ethics Laws for Constitutional Officers & Elected Municipal Officers (Video Tutorial):

<https://youtu.be/U8JktIMKzyl>

Office of the Attorney General offers training on Sunshine Law and Public Records Law (22-page presentation):

<https://www.myfloridalegal.com/sites/default/files/2023-05/opengovernmentoverview.pdf>

Office of the Attorney General 2-hour Audio Presentation regarding Public Meetings and Public Records Law:

<https://www.myfloridalegal.com/sites/default/files/Full%2520audio%25202018%5B2%5D.mp3>

As always, if you have any questions regarding this information, please feel free to contact me directly at 954-658-4900.

RESOLUTION 2024-22

A RESOLUTION DESIGNATING CERTAIN OFFICERS OF THE PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT; PROVIDING FOR SEVERABILITY AND INVALID PROVISIONS; PROVIDING FOR CONFLICT AND PROVIDING FOR AN EFFECTIVE DATE.

RECITALS

WHEREAS, the Pioneer Ranch Community Development District (“**District**”) is a local unit of special-purpose government created and existing pursuant to Chapter 190, *Florida Statutes*, being situated entirely within Marion County, Florida, and:

WHEREAS, pursuant to Chapter 190.006, *Florida Statutes*, the Board of Supervisors (“**Board**”) shall organize by election of its members as Chairperson and by directing a Secretary, and such other officers as the Board may deem necessary; and

WHEREAS, the Board of Supervisors of the Pioneer Ranch Community Development District desire to appoint the below recited person(s) to the offices specified.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT:

SECTION 1. DESIGNATION OF OFFICERS OF THE DISTRICT. The following persons are hereby appointed to the offices shown.

OFFICE	NAME OF OFFICE HOLDER
CHAIRPERSON	
VICE-CHAIRPERSON	
ASSISTANT SECRETARY	
ASSISTANT SECRETARY	
ASSISTANT SECRETARY	
SECRETARY & TREASURER	JAMES P. WARD

SECTION 2. SEVERABILITY AND INVALID PROVISIONS. If any one of the covenants, agreements or provisions herein contained shall be held contrary to any express provision of law or contract to the policy of express law, but not expressly prohibited or against public policy, or shall for any reason whatsoever be held invalid, then such covenants, agreements or provisions shall be null and void and shall be deemed separable from the remaining covenants, agreements or provisions and shall in no way effect the validity of the other provisions hereof.

SECTION 3. CONFLICT. That all Sections or parts of Sections of any Resolutions, Agreements, or actions of the Board of Supervisors in conflict are hereby repealed to the extent of such conflict.

RESOLUTION 2024-22

A RESOLUTION DESIGNATING CERTAIN OFFICERS OF THE PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT; PROVIDING FOR SEVERABILITY AND INVALID PROVISIONS; PROVIDING FOR CONFLICT AND PROVIDING FOR AN EFFECTIVE DATE.

SECTION 4. PROVIDING FOR AN EFFECTIVE DATE. This Resolution shall become effective immediately upon passage.

PASSED AND ADOPTED by the Board of Supervisors of the Pioneer Ranch Community Development District, Marion County, Florida, this 16th day of April 2024.

ATTEST:

**PIONEER RANCH COMMUNITY
DEVELOPMENT DISTRICT**

James P. Ward, Secretary

Name: _____
Chairman / Vice-Chairman

RESOLUTION 2024-23

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT CANVASSING AND CERTIFYING THE RESULTS OF THE LANDOWNERS ELECTION OF SUPERVISORS HELD PURSUANT TO SECTION 190.006(2), FLORIDA STATUTES, AND PROVIDING FOR AN EFFECTIVE DATE.

RECITALS

WHEREAS, the Pioneer Ranch Community Development District (“**District**”) is a local unit of special-purpose government created and existing pursuant to Chapter 190, *Florida Statutes*, being situated entirely within Marion County, Florida; and

WHEREAS, pursuant to Section 190.006(2), *Florida Statutes*, a Landowners Meeting is required to be held within 90 days of the District’s creation, and every two years following the creation of the District, for the purpose of electing supervisors of the District; and

WHEREAS, such Landowners Meeting was held on April 16, 2024, and at which the below recited persons were duly elected by virtue of the votes cast in his/her favor; and

WHEREAS, the Board of Supervisors of the District, by means of this Resolution, desires to canvass the votes and declare and certify the results of said election.

NOW THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT:

SECTION 1. ELECTION RESULTS. The following persons are found, certified, and declared to have been duly elected as Supervisors of and for the District, having been elected by the votes cast in their favor as shown:

NAME OF INDIVIDUAL ELECTED	SEAT NUMBER	NUMBER OF VOTES
	1	
	2	
	3	
	4	
	5	

RESOLUTION 2024-23

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT CANVASSING AND CERTIFYING THE RESULTS OF THE LANDOWNERS ELECTION OF SUPERVISORS HELD PURSUANT TO SECTION 190.006(2), FLORIDA STATUTES, AND PROVIDING FOR AN EFFECTIVE DATE.

SECTION 2. TERMS. In accordance with Section 190.006(2), Florida Statutes, and by virtue of the number of votes cast for the Supervisors, the above-named persons are declared to have been elected for the following terms of office:

NAME OF INDIVIDUAL ELECTED	TERM OF OFFICE	TERM UP FOR ELCTION
	FOUR (4)	November, 2028
	FOUR (4)	November, 2028
	TWO (2)	November, 2026
	TWO (2)	November, 2026
	TWO (2)	November, 2026

SECTION 3. SEVERABILITY AND INVALID PROVISIONS. If any one of the covenants, agreements or provisions herein contained shall be held contrary to any express provision of law or contract to the policy of express law, but not expressly prohibited or against public policy, or shall for any reason whatsoever be held invalid, then such covenants, agreements or provisions shall be null and void and shall be deemed separable from the remaining covenants, agreements or provisions and shall in no way effect the validity of the other provisions hereof.

SECTION 4. CONFLICT. That all Sections or parts of Sections of any Resolutions, Agreements, or actions of the Board of Supervisors in conflict are hereby repealed to the extent of such conflict.

SECTION 5. EFFECTIVE DATE. This Resolution shall take effect upon the passage and adoption of this Resolution by the Board of Supervisors of the Pioneer Ranch Community Development District.

PASSED AND ADOPTED by the Board of Supervisors of the Pioneer Ranch Community Development District, Marion County, Florida, this 16th day of April 2024.

ATTEST:

PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT

James P. Ward, Secretary

Name: _____
Chairperson / Vice-Chairperson

RESOLUTION 2024-24

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT EXTENDING THE TERMS OF OFFICE OF ALL CURRENT SUPERVISORS TO COINCIDE WITH THE GENERAL ELECTION PURSUANT TO SECTION 190.006 OF THE FLORIDA STATUTES; PROVIDING FOR SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the Pioneer Ranch Community Development District (the “District”) is a local unit of special purpose government created and existing pursuant to Chapter 190, Florida Statutes; and

WHEREAS, the current members of the Board of Supervisors (the “Board”) were elected by the landowners within the District at the Landowners election of April 16, 2024 based on a one acre/one vote basis; and

WHEREAS, Chapter 190, Florida Statutes, authorizes the Board to adopt a resolution extending or reducing the terms of office of the Board members to coincide with the general election in November of even number years; and

WHEREAS, the Board of Supervisors finds that it is in the best interests of the District to adopt this Resolution extending the terms of office of all current Supervisors of the District.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT:

SECTION 1. The following terms of office are hereby extended to coincide with the general election to be held in November 2026:

Seat #__ (currently held by _____)

Seat #__ (currently held by _____)

Seat #__ (currently held by _____)

The following terms of office are hereby extended to coincide with the general election to be held in November of 2028:

Seat #__ (currently held by _____)

Seat #__ (currently held by _____)

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

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

RESOLUTION 2024-4

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT EXTENDING THE TERMS OF OFFICE OF ALL CURRENT SUPERVISORS TO COINCIDE WITH THE GENERAL ELECTION PURSUANT TO SECTION 190.006 OF THE FLORIDA STATUTES; PROVIDING FOR SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE.

SECTION 4. This Resolution shall become effective immediately upon passage.

PASSED AND ADOPTED by the Board of Supervisors of the Pioneer Ranch Community Development District, Marion County, Florida, this 16th day of April 2024

ATTEST:

PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT

James P. Ward, Secretary

Name: _____
Chairperson / Vice-Chairperson

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**MINUTES OF MEETING
MARION RANCH
COMMUNITY DEVELOPMENT DISTRICT**

10 The meeting of the Board of Supervisors of the Marion Ranch Community Development District was
11 held on Tuesday, February 20, 2024, at 3:00 P.M. at the offices of Lennar Homes, 2100 SE 17th Street,
12 Suite 601, Ocala, FL 34471.
13
14

15
16
17
18
19

Present and constituting a quorum:

20 Chris Armstrong	Chairperson
21 Andrea Agha	Vice Chairperson
22 Ron Wiese	Assistant Secretary
23 Frank Perez	Assistant Secretary

24
25
26
27

Absent:

28 David Garcia	Assistant Secretary
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29
30
31
32

Also present were:

33 James P. Ward	District Manager
34 Greg Urbancic	District Attorney

35
36
37
38

Audience:

39 Russell Smith	Lennar Homes
40 Alec Morris	Armstrong Homes

41 All residents' names were not included with the minutes. If a resident did not identify
42 themselves or the audio file did not pick up the name, the name was not recorded in these
43 minutes.
44

45
46
47
48

**PORTIONS OF THIS MEETING WERE TRANSCRIBED VERBATIM. ALL VERBATIM PORTIONS WERE
TRANSCRIBED IN *ITALICS*.**

FIRST ORDER OF BUSINESS

Call to Order/Roll Call

Mr. James P. Ward called the meeting to order at approximately 3:10 p.m. He conducted roll call; all
Members of the Board were present, except for Supervisor Garcia, constituting a quorum.

SECOND ORDER OF BUSINESS

Notice of Advertisement

Notice of Advertisement of Meeting

The meeting was duly noticed.

49 **THIRD ORDER OF BUSINESS** **Consideration of Minutes**

50

51 **January 23, 2024 – Organizational Meeting Minutes**

52

53 Mr. Ward asked if there were any corrections, additions, or deletions; there were none.

54

55

On MOTION made by Chris Armstrong, seconded by Andrea Agha, and with all in favor, the January 23, 2024, Organizational Meeting Minutes were approved.

56

57

58

59

60

61 **FOURTH ORDER OF BUSINESS** **Consideration of Resolution 2024-22**

62

63 **Consideration of Resolution 2024-22, a Resolution of the Board of Supervisors of Marion Ranch**
64 **Community Development District Declaring Special Assessments; Indicating the location, nature and**
65 **estimated cost of those Improvements which cost is to be defrayed in whole or in part by the Special**
66 **Assessments; Providing the portion of the estimated cost of the Improvements to be defrayed in**
67 **whole or in part by the Special Assessments; Providing the manner in which such Special Assessments**
68 **shall be made; Providing when such Special Assessments shall be made; designating Lands upon which**
69 **the Special Assessments shall be levied; Providing for an Assessment Plat; Adopting a Preliminary**
70 **Assessment Roll; Providing for a Public Hearing to consider the advisability and propriety of said**
71 **Assessments and the related Improvements; Providing for notice of said Public Hearing; Providing for**
72 **publication of this Resolution; Providing for conflicts, providing for severability and providing an**
73 **effective date**

74

75 Mr. Ward explained the primary purpose of today’s meeting was to begin the process for levying special
76 assessments on the land in Marion Ranch for the capital improvement programs. He noted there were
77 two resolutions related to this process; the first was Resolution 2024-22, the declaring resolution, the
78 resolution of intent to levy special assessments. He explained it provided for the manner in which the
79 District levied assessments. He stated an Engineering Report would be adopted as part of the process,
80 as well as a Special Assessment Methodology; both documents were attached to the Resolution. He
81 stated the public hearing, the subject of Resolution 2024-23, was scheduled for April 16, 2024, at 3:00
82 p.m. at the offices of Lennar Homes. He explained once today’s resolutions were adopted, he would
83 send mailed notice to the landowner in the District, and the landowner would have the opportunity to
84 appear before the CDD at the public hearing. He indicated there was only one landowner, Freedom
85 Commons Development, in the Marion Ranch District.

86

87 Discussion ensued regarding who owned land in Marion Ranch; several lots had been sold.

88

89 Mr. Ward noted the Property Appraiser’s website did not show any other landowners in the District.

90

91 Mr. Armstrong noted the Property Appraiser was about a month and a half behind.

92

93 Mr. Russell Smith asked when notices would be prepared and when they would go out.

94

95 Mr. Ward indicated notice would be sent tomorrow.

96

97 Mr. Armstrong indicated Lennar and the other landowners should also be sent notice.

98

99 *Mr. Ward: I can't change my report in 24 hours. The lots, if they are not showing on the Property*
100 *Appraiser's website, I'm comfortable with noticing just the primary landowner which is Freedom*
101 *Commons Development, because there are no platted lots yet. I can update this for purposes of the*
102 *public hearing if we get to the point of showing those. Is Lennar the only other owner?*

103

104 Mr. Armstrong: *Pulte owns lots and Lennar owns lots. And it is platted.*

105

106 Discussion continued regarding whether the lots were platted; and what the Property Appraiser website
107 showed.

108

109 *Mr. Greg Urbancic: I think we have to go off the roll, but that doesn't mean we can't send, "we've been*
110 *advised, notwithstanding the roll, that you are a purchaser of lots," and send Pulte and Lennar separate*
111 *mailed notices just to cover our bases, even if it is not showing up in the Appraiser, that way there can be*
112 *no question that we provided notice to people even though the Property Appraiser says what it says.*

113

114 *Mr. Ward: Okay.*

115

116 Mr. Smith: *Incidentally, both parties have agreed to the CDD and the particulars of it in their purchase*
117 *contracts.*

118

119 *Mr. Ward: The Engineer's Report is designed to identify the proposed development program which*
120 *consists of six phases of development in total, 1,218 units over those six phases. The District's Master*
121 *Program covers all six phases. Once we get through this program, you will then go through a process*
122 *where you define exactly which units, or how many in each of the six phases you are going to develop*
123 *with your first phase of bonds and from there we will prepare additional Engineer's Reports, additional*
124 *methodologies that tie out to what your proposed development areas are going to be. The infrastructure*
125 *that's covered pursuant to your Engineer's Report is what we call public infrastructure, so it includes*
126 *public roadways, the stormwater management system, utilities, that will then be turned over to the*
127 *appropriate authority which I'm guessing is Marion County utilities in this community and any*
128 *landscaping, irrigation or hardscapes that are related to it. It doesn't include amenities such as vertical*
129 *infrastructure for golf courses or pools or clubhouses and can include, and in this instance does include*
130 *some small off-site roadways that are part of the District's infrastructure program. The total cost of the*
131 *public improvements pursuant to the Engineer's Report is \$57.9 million dollars that flows into the*
132 *methodology which will then flow into the maximum you will be able to issue in a bond issue. He stated*
133 *the methodology was basically the report that outlined how you assign the par debt for each particular*
134 *lot. What we do is take the land use plan. It's based on lot sizes. That lot size flows in this methodology*
135 *where the smaller the lot size, the smaller the assessment, and then on up until you hit the largest*
136 *product size, and that identifies the largest assessment area. This does not include common areas, only*
137 *buildable lots. We exclude the common areas, roadways, etc. Then we determine what's the maximum*
138 *amount of debt you can issue for this District over the life of the District. That number is \$70 million*
139 *dollars. That is the amount you authorized in your last board meeting as the amount of money that you*
140 *will validate these bonds for. As a part of that validation process, we will include the methodology and*
141 *the Engineer's Report. With respect to that I go through the laborious process of telling you how we*
142 *assign the benefit that accrues to specific lots as a result of the imposition of the capital assessment*
143 *programs. You can take a look at that at your leisure. As I said, \$57.9 million dollars translates into \$70*

144 million dollars in par debt. This is a very high number. I'm sure you will issue much less than that. This
 145 gives you the outside parameters of what you can do. It does set up the procedure for mailed notice that
 146 goes to the property owners identified on the Marion County Property Appraiser's Roll which apparently
 147 has changed as of today. One thing I will point out to you, in reviewing the assessment rolls, I noted that
 148 there was 9.7 acres of land in your land use plan that is commercial development that's within the
 149 boundaries of the District. My report, as does the Engineer's Report, excepts out that 9.7 acres of land,
 150 so all of the capital infrastructure, \$57.9 million dollars, plus my assessment methodology, excludes any
 151 infrastructure associated with the \$9.7 acres of development. I will recommend to you at some point we
 152 need to go through the process of amending your boundaries of this District and getting that commercial
 153 property out of there for a plethora of reasons, but it does not have to be done at this moment in time.

154
 155 Mr. Smith: And it will make it so the commercial people don't have to be a member of the CDD, they
 156 don't get a vote on the CDD, it just makes everything easier.

157
 158 Mr. Ward: It will also exempt them out of any capital assessments or any future operating assessments.

159
 160 **On MOTION made by Ron Wiese, seconded by Andrea Agha, and with**
 161 **all in favor, Resolution 2024-22 was adopted subject to notice to**
 162 **Lennar Homes and Pulte Homes as a result of earlier discussion, and**
 163 **the Chair was authorized to sign.**

164
 165
 166 **FIFTH ORDER OF BUSINESS**

Consideration of Resolution 2024-23

167
 168 **Consideration of Resolution 2024-23, a Resolution of the Board of Supervisors of Marion Ranch**
 169 **Community Development District Setting a Public Hearing to be held on April 16, 2024 at 3:00 P.M., at**
 170 **the offices of Lennar Homes, 2100 SE 17th Street, Suite 601, Ocala, FL 34471, for the purpose of**
 171 **hearing public comment on imposing Special Assessments on certain property within the District**
 172 **generally described as the Marion Ranch Community Development District in accordance with**
 173 **Chapters 170, 190 and 197, Florida Statutes; providing for conflicts, providing for severability and**
 174 **providing an effective date**

175
 176 Mr. Ward indicated Resolution 2024-23 set the public hearing time, date, and location. He asked if
 177 there were any questions; hearing none, he called for a motion.

178
 179 **On MOTION made by Andrea Agha, seconded by Ron Wiese, and with**
 180 **all in favor, Resolution 2024-23 was adopted, and the Chair was**
 181 **authorized to sign.**

182
 183
 184 **SIXTH ORDER OF BUSINESS**

Staff Reports

185
 186 **I. District Attorney**

187
 188 *Mr. Urbancic: Now that we've approved these resolutions, we can move forward in validating the*
 189 *bond resolution and the assessment resolutions collectively. So, I will be working on that and getting*

190 *it filed. I will update the Board on the progress at the next meeting, but we should have that in fairly*
191 *quickly. Otherwise, I didn't have anything else to report today.*

192
193 Mr. Smith: *Could you update everybody in advance of the next meeting when it's filed and when you*
194 *have a hearing date set and all of that?*

195
196 *Mr. Urbancic: Certainly. I will.*

197
198 **II. District Engineer**

199
200 No report.

201
202 **III. District Manager**

- 203
- 204 **a) Board Meeting Dates for Balance of Fiscal Year 2024**
- 205 **i. Landowner's and Regular Meeting – April 16, 2024, 3:30 P.M.**
- 206 **ii. Public Hearings:**
- 207 **1. Uniform Method of Collection – April 16, 2024, 3:30 P.M.**
- 208 **2. Fiscal Year 2024 Budget – April 16, 2024, 3:30 P.M.**
- 209 **3. Initial Special Assessments – April 16, 2024, 3:30 P.M.**

210
211 *Mr. Ward: Your April 16th meeting will be your Landowner's Meeting. Remember I advised*
212 *you at this point you are basically an interim board. So, the landowners at that meeting will*
213 *then elect the final board. And now that I know there is more than one landowner, I will need*
214 *some kind of a legal description of what you own that's excluding the Lennar property and the*
215 *Pulte property, and Russ you can vote your lots to the extent that you desire to do so at the*
216 *Landowner's Meeting.*

217
218 Discussion ensued regarding the existing lots, closed lots, and legal descriptions of lots.

219
220 *Mr. Ward: Your Form 1 is due two days from now.* He encouraged the Board to file their Form
221 *1 to avoid late fees.*

222
223
224 **SEVENTH ORDER OF BUSINESS Supervisor's Requests**

225
226 Mr. Ward asked if there were any supervisor's requests; there were none.

227
228
229 **EIGHTH ORDER OF BUSINESS Public Comments**

230
231 **The public comment period is for items not listed on the Agenda, and comments are limited to three**
232 **(3) minutes per person and assignment of speaking time is not permitted; however, the Presiding**
233 **Officer may extend or reduce the time for the public comment period consistent with Section**
234 **286.0114, Florida Statutes**

235
236 Mr. Ward asked if there were any public comments; there were none.

237

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NINTH ORDER OF BUSINESS Adjournment

Mr. Ward adjourned the meeting at approximately 3:25 p.m.

On MOTION made by Chris Armstrong, seconded by Ron Wiese, and with all in favor, the meeting was adjourned.

Marion Ranch Community Development District

James P. Ward, Secretary

Chris Armstrong, Chairperson

DRAFT

Tillman & Associates

ENGINEERING, LLC.

Via: Electronic

March 8, 2024

JP Ward and Associates, LLC
2301 Northeast 37th Street
Fort Lauderdale, FL 33308

RE: RFQ for Engineering Services for the Marion Ranch CDD

Enclosed please find the following items for the above-mentioned RFQ:

- (7) State Licenses
- (1) DBPR Business License
- (1) Architect-Engineer Qualifications, Standard Form No. 330

Dear Members of the Selection Committee:

Tillman & Associates is pleased to present you with the strongest and most knowledgeable local team for the Marion Ranch Community Development District. Our team is strategically assembled to meet your challenges. Tillman has previously worked on Exhibits and Engineering Reports for the District.

We have reviewed your Request for Qualifications and fully understand the required roles and responsibilities. We are committed and available to provide these services within time and budget requirements, as we understand their importance. This project needs to be completed on time to provide reliable engineering services that will attract future development and support the projected growth of the District. Our current workload is at 85% and our projected workload, should we be awarded this contract is 90%.

Our professionals at Tillman & Associates have over 100 years of combined Civil Engineering, Land Planning, Surveying, Landscape Architecture, and Environmental Engineering experience. We are an experienced, cost-effective engineering firm that can quickly adapt to challenges as they arise. We have extensive experience with local municipalities, and a local understanding of criteria, and staff goals, allowing for quicker project completion. Tillman is not a minority owned business.

Should we be awarded this contract, Timothy C. Brooker, P.E. will be the specific individual who will be handling District meetings, construction services, and other engineering tasks.

We look forward to working with you on this project. If you have any questions or comments regarding our qualifications, please contact us at our office in Ocala, 352.387.4540.

Sincerely,



Timothy C. Brooker, P.E.
Project Engineer



Ron DeSantis, Governor

Melanie S. Griffin, Secretary



STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

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

TILLMAN, JONATHAN DAVID

1720 SE 16TH AVENUE
BUILDING 100
OCALA FL 34471

LICENSE NUMBER: PE60281

EXPIRATION DATE: FEBRUARY 28, 2025

Always verify licenses online at MyFloridaLicense.com



Do not alter this document in any form.

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



Ron DeSantis, Governor

Melanie S. Griffin, Secretary



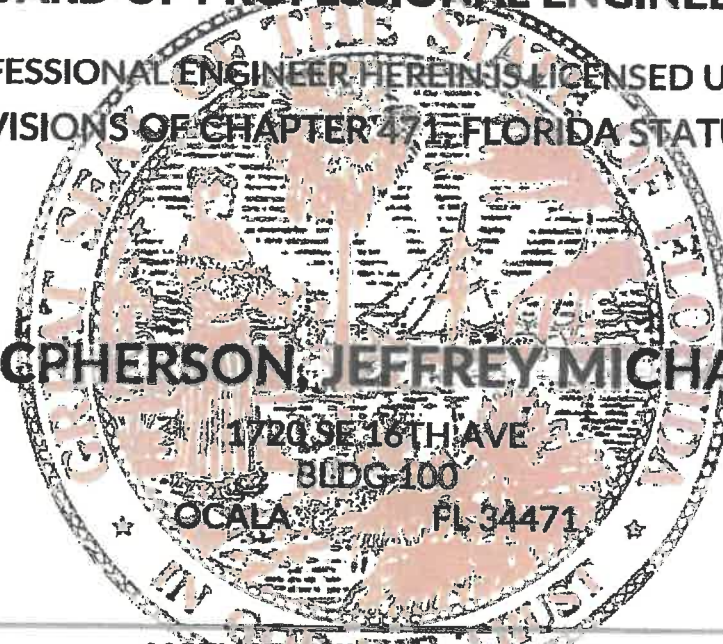
FBPE
FLORIDA BOARD OF
PROFESSIONAL ENGINEERS

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

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

MCPHERSON, JEFFREY MICHAEL



1720 SE 18TH AVE
BLDG-100

OCALA FL 34471

LICENSE NUMBER: PE69905

EXPIRATION DATE: FEBRUARY 28, 2025

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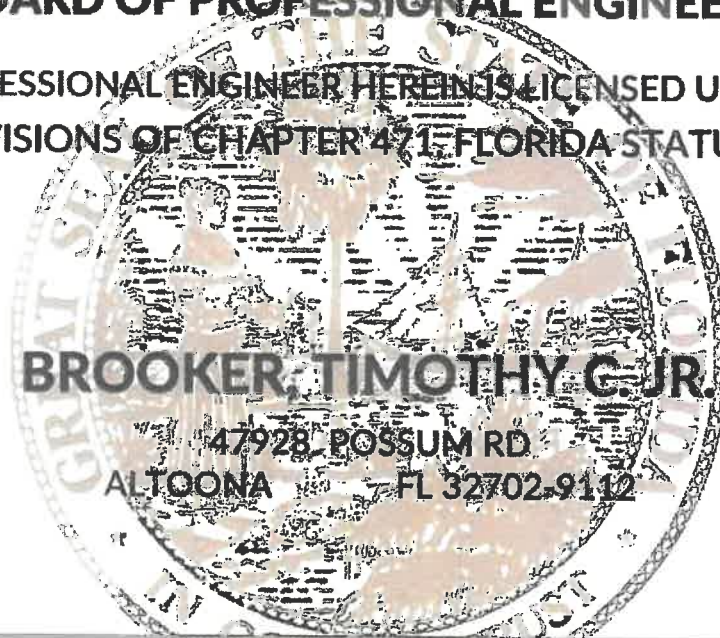
Melanie S. Griffin, Secretary



STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

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BROOKER, TIMOTHY G. JR.

47928 POSSUM RD
ALTOONA FL 32702-9112

LICENSE NUMBER: PE79259

EXPIRATION DATE: FEBRUARY 28, 2025

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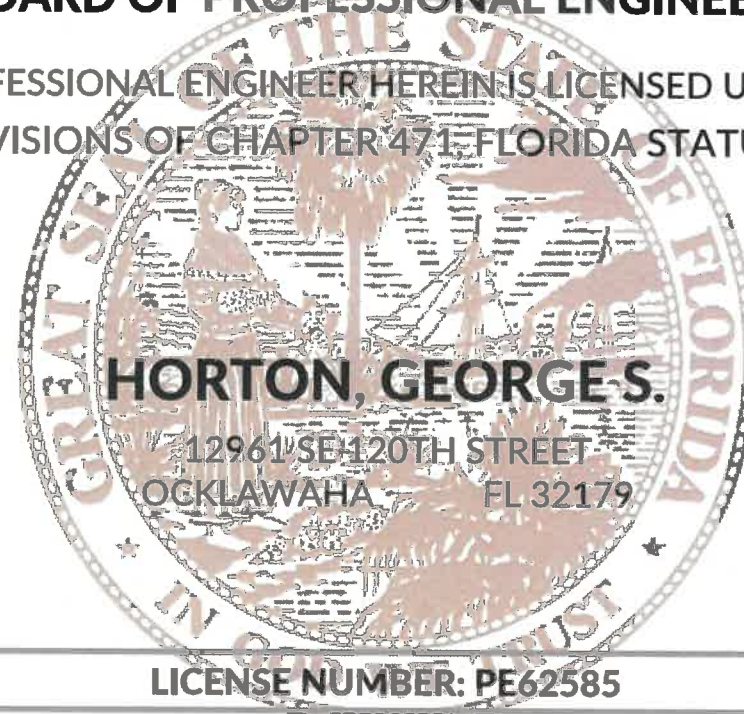


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HORTON, GEORGE S.

12961 SE 120TH STREET
OGKLAWAHA FL 32179

LICENSE NUMBER: PE62585

EXPIRATION DATE: FEBRUARY 28, 2025

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ATCHLEY, KEVIN LEE

3373 SW 51ST TERRACE
OCALA FL 34474

LICENSE NUMBER: PE53119

EXPIRATION DATE: FEBRUARY 28, 2025

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Ron DeSantis, Governor

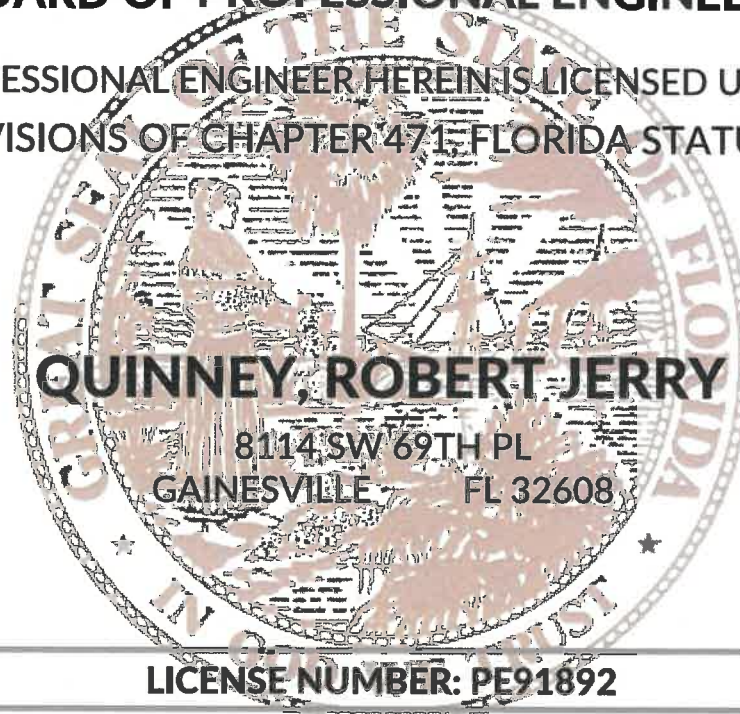
Melanie S. Griffin, Secretary



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LICENSE NUMBER: PE91892

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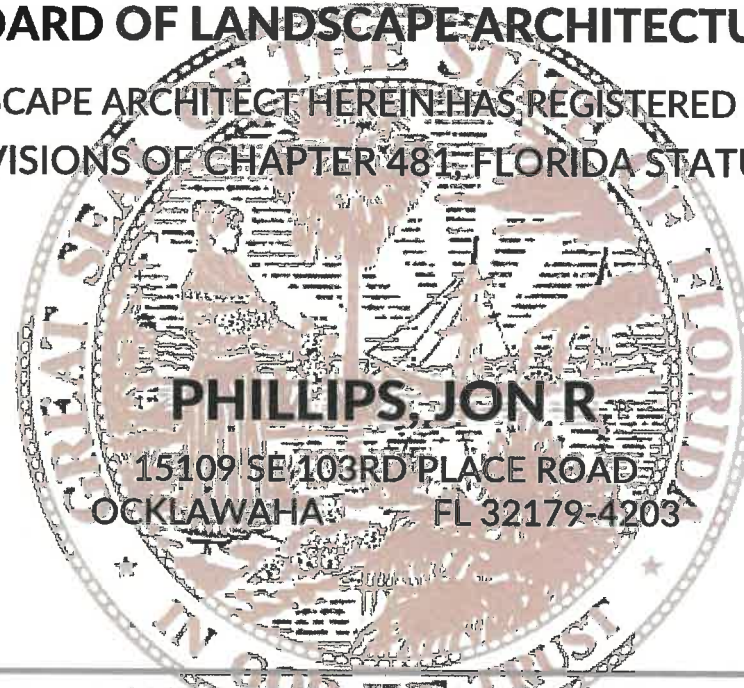
Melanie S. Griffin, Secretary



STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

BOARD OF LANDSCAPE ARCHITECTURE

THE LANDSCAPE ARCHITECT HEREIN HAS REGISTERED UNDER THE
PROVISIONS OF CHAPTER 481, FLORIDA STATUTES



PHILLIPS, JON R.

15109 SE 103RD PLACE ROAD
OCKLAWAHA FL 32179-4203

LICENSE NUMBER: LA6666960

EXPIRATION DATE: NOVEMBER 30, 2025

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ISSUED: 11/11/2023

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LICENSEE DETAILS

4:01:38 PM 2/1/2024

Licensee Information

Name:	TILLMAN AND ASSOCIATES ENGINEERING, LLC (Primary Name)
Main Address:	1720 SE 16TH AVENUE BUILDING 100 OCALA Florida 34471
County:	MARION

License Information

License Type:	Engineering Business Registry
Rank:	Registry
License Number:	26756
Status:	Current
Licensure Date:	12/27/2005
Expires:	

Special Qualifications

Qualification Effective

Alternate Names

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ARCHITECT-ENGINEER QUALIFICATIONS

PART I - CONTRACT-SPECIFIC QUALIFICATIONS

A. CONTRACT INFORMATION

1. TITLE AND LOCATION <i>(City and State)</i> RFQ for Engineering Services for the Marion Ranch CDD in Ocala, Florida	
2. PUBLIC NOTICE DATE 02/04/2024	3. SOLICITATION OR PROJECT NUMBER

B. ARCHITECT-ENGINEER POINT OF CONTACT

4. NAME AND TITLE Timothy C. Brooker, P.E.		
5. NAME OF FIRM Tillman & Associates Engineering, LLC		
6. TELEPHONE NUMBER 352-387-4540	7. FAX NUMBER 352-387-4545	8. E-MAIL ADDRESS permits@tillmaneng.com

C. PROPOSED TEAM

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

	(Check)				9. FIRM NAME	10. ADDRESS	11. ROLE IN THIS CONTRACT
	PRIME	J-V	PARTNER	SUBCON-TRACTOR			
a.	✓				Tillman & Associates Engineering, LLC <input type="checkbox"/> CHECK IF BRANCH OFFICE	1720 SE 16th Ave., Bldg. 100 Ocala, FL 34471	Civil Engineer / Landscape Architect
b.					 <input type="checkbox"/> CHECK IF BRANCH OFFICE		
c.					 <input type="checkbox"/> CHECK IF BRANCH OFFICE		
d.					 <input type="checkbox"/> CHECK IF BRANCH OFFICE		
e.					 <input type="checkbox"/> CHECK IF BRANCH OFFICE		
f.					 <input type="checkbox"/> CHECK IF BRANCH OFFICE		

D. ORGANIZATIONAL CHART OF PROPOSED TEAM

(Attached)

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME J. David Tillman, P.E.	13. ROLE IN THIS CONTRACT Professional Engineer	14. YEARS EXPERIENCE	
		a. TOTAL 28	b. WITH CURRENT FIRM 18

15. FIRM NAME AND LOCATION *(City and State)*
Tillman & Associates Engineering, LLC in Ocala, FL

16. EDUCATION <i>(Degree and Specialization)</i> Bachelor of Science, Civil Engineering, Georgia Institute of Technology - March 1994	17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Registered Professional Engineer in Florida #60281, Georgia #34101, and Tennessee #115671
--	--

18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*
Software: AutoCAD 2014, WaterCAD, SewerCAD / Affiliations: American Society of Civil Engineers, Florida Engineering Society, The National Council of Examiners for Engineering and Surveying Certified, GASWCC Certified / Other accomplishments: Ocala Silver Springs Rotary, Marion County Land Development Regulation Commission Member

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i> Irish Acres Water Treatment Facility in Ocala, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
a. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Constructed a 750K gal. Ground Storage Tank with associated piping and appurtenances, High Service Pump building, installation of multiple pumps complete with tors, coupling, bases, and accessories, associated yard piping, emergency generator, and relocation of existing chlorine dosing pumps to well heads. <input checked="" type="checkbox"/> Check if project performed with current firm		
(1) TITLE AND LOCATION <i>(City and State)</i> Marion Oaks Water Treatment Plant #4 in Ocala, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
b. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Planning and design stages of upgrades to WTP including the addition of a well with a 12" casing and capacity to pump 1000 gpm, replacing the two (2) existing 600 gpm High Service Pumps with three (3) 1500 gpm pumps. <input checked="" type="checkbox"/> Check if project performed with current firm		
(1) TITLE AND LOCATION <i>(City and State)</i> Golden Ocala - World Equestrian Center Master Water and Wastewater System Planning and Modeling	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
c. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Developed a phased WaterGEMS Hydraulic Model of the existing and future Golden Ocala Development, proposed World Equestrian Center development and proposed watermain interconnect to the Trilogy WTP. Identified key improvements for each phase. A majority of the watermain improvements outlined in this model have been permitted with Marion County Utilities Department (MCUD) and FDEP. <input checked="" type="checkbox"/> Check if project performed with current firm		
(1) TITLE AND LOCATION <i>(City and State)</i> SW 66th Street at CR475A Improvements	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
d. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE The existing roadway consists of 3,736-lf of 2-lane rural section roadway with minimal conveyance systems and an undersized stormwater retention system. The project area had been previously analyzed as part of a Floodplain Analysis for SR 200 Watershed (L463). The project scope includes design and permitting of an urban roadway section (elevated out of the floodplain) with turn lane additions and an expanded stormwater management facility for compensating storage and flood relief. <input checked="" type="checkbox"/> Check if project performed with current firm		
(1) TITLE AND LOCATION <i>(City and State)</i> SW 40th/49th Avenue Improvement - Phase 1- from SW 66th St. to SW 43rd St. Rd.	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
e. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Project includes four lane urban section (grassed median, sidewalk, & bicycle lanes) turn lane additions, signalized intersections, tormwater management systems, and utility extensions. Scope also includes: development and analysis of roadway alignment, profile, and typical sections with alternatives, R/W acquisition requirements, quantities, estimates of probable cost, bidding, and project & sub-consultant management (transportation, survey, geotechnical, ecological, and environmental). <input checked="" type="checkbox"/> Check if project performed with current firm		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME Jeff McPherson, P.E.	13. ROLE IN THIS CONTRACT Professional Engineer	14. YEARS EXPERIENCE	
		a. TOTAL 20	b. WITH CURRENT FIRM 18
15. FIRM NAME AND LOCATION <i>(City and State)</i> Tillman & Associates Engineering, LLC in Ocala, FL			
16. EDUCATION <i>(Degree and Specialization)</i> Bachelor of Science, Civil Engineering, Michigan University University - 2004.		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Registered Professional Engineer in Florida #69905 and Georgia #037862	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i> Software: AutoCAD, WaterCAD, SewerCAD, AdICPR, PONDS, MODRET, ArcGIS Affiliations: Florida Engineering Society, NSPE			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i> Calesa Roan Hills Phase 1& 2 in Ocala, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
a. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Construction of 529 residential lots, roadways, driveways, sidewalks, and associated structures. EOR.	<input checked="" type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> Calesa Sorrel Glen Phase 1 & 2 in Ocala, Florida	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
b. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Construction of 364 lots residential subdivision with associated roadways and infrastructure.	<input checked="" type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> On Top of the World Longleaf Ridge Phases 3-8 in Ocala, Florida	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
c. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Construction of a 66.1 acre, 161 lot residential subdivision. Includes construction of internal access roadways, driveways, internal stormwater collection and conveyance system, and related infrastructure. EOR.	<input checked="" type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> On Top of the World Weybourne Phases 1A,1B,1C,1D and Phase 2 in Ocala, Florida	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
d. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Construction of 80 residential lots, internal roadways, a conveyance swale, and associated infrastructure. EOR.	<input checked="" type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> Ocala Meadow Farms in Ocala, Florida	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
e. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Construction of a golf course and 202 lots on 282.8 acres. EOR.	<input checked="" type="checkbox"/> Check if project performed with current firm	

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME Timothy Brooker, P.E.	13. ROLE IN THIS CONTRACT Professional Engineer	14. YEARS EXPERIENCE	
		a. TOTAL 25	b. WITH CURRENT FIRM 13
15. FIRM NAME AND LOCATION <i>(City and State)</i> Tillman & Associates Engineering, LLC in Ocala, FL			
16. EDUCATION <i>(Degree and Specialization)</i> Bachelor of Science, Civil Engineering, University of Florida - 2007		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Registered Professional Engineer in Florida #79259	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i> Software: AdICPR, AutoCAD Civil 3D, Stormwater Studio, PONDS, StormCAD, MODRET, ArcGIS			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i> Freedom Commons SW 82nd Place Road in Ocala, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
a. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Project Manager and Lead Designer - Project consisted of design and permitting of approximately 0.8 miles of two lane divided roadway (designed to allow for future expansion to four lane) with grassed median, sidewalk, multi-modal path, turn lanes, roundabout intersection, stormwater management systems, and utility extensions.		
(1) TITLE AND LOCATION <i>(City and State)</i> SW 40th/49th Ave. Improvements - Phase 1 in Ocala, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
b. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Project Engineer - Project includes four lane urban section (grassed median, sidewalk, & bicycle lanes) turn lane additions, signalized intersections, stormwater management systems, and utility extensions. Scope also includes: development and analysis of roadway alignment, profile and typical sections with alternatives.		
(1) TITLE AND LOCATION <i>(City and State)</i> On Top of the World Communities - Earl Township Roadway Extension in Ocala, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
c. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Project Manager and Lead Designer - Project consisted of design and permitting of approximately 2.2 miles of two lane divided roadway (designed to allow for future expansion to four lane) with grassed median, sidewalk, multi-modal path, turn lanes, stormwater management systems, and utility extensions.		
(1) TITLE AND LOCATION <i>(City and State)</i> Marion Oaks Manor Forcemain Relocation in Ocala, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
d. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Project consisted of designing approximately 4,500 LF of 12" forcemain that meets the requirements of the Marion County Land Development Code which will extend from an existing Marion Oaks WWTP south along SW 34th Ct. Rd. then west along Marion Oaks Manor to the existing forcemain connection location.		
(1) TITLE AND LOCATION <i>(City and State)</i> Liberty Village Residential Development in Ocala, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
e. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Project consisted of design and plan review of approximately 6,400 LF of offsite FM extension and design of on-site system including approximately 8,000 LF of 8" gravity, 650 LF of 6" FM and one lift station for the development and future commercial.		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME George Horton, P.E.	13. ROLE IN THIS CONTRACT Professional Engineer	14. YEARS EXPERIENCE	
		a. TOTAL 24	b. WITH CURRENT FIRM 13
15. FIRM NAME AND LOCATION <i>(City and State)</i> Tillman & Associates Engineering, LLC in Ocala, FL			
16. EDUCATION <i>(Degree and Specialization)</i> Bachelor of Science, Civil Engineering, University of Florida - December 1999		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Registered Professional Engineer in Florida #62585	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i> Software: AdjCPR, AutoCAD Civil 3D 2022, Stormwater Studio 2022, PONDS, WaterCAD / Affiliations: American Society of Civil Engineers / Other Accomplishments: FDEP Qualified Stormwater Management Inspector #5140			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
World Equestrian Center (WEC) in Ocala, FL	PROFESSIONAL SERVICES 2020	CONSTRUCTION <i>(If applicable)</i> 2020
a. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Master water and wastewater system planning & modeling developed a phased WaterGEMS Hydraulic Model of the existing and future Golden Ocala dev., proposed W.E.C. dev., and proposed watermain interconnect to the Trilogy WTP. Identified key improvements for each phase. Developed a Wastewater Model of the proposed lift stations.		
Flex Arena/Barns 3-4-5 at WEC in Ocala, FL	PROFESSIONAL SERVICES 2022	CONSTRUCTION <i>(If applicable)</i> 2022
b. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Consisting of three 135,000 sf buildings with associated water and fire distribution system and sewer collection/transmission system site improvements. Project integrated into exiting master water and wastewater system models for WEC to develop new system design and municipal system response to added demands.		
SR 40 Entrance Driveway to WEC Utility Extension in Ocala, FL	PROFESSIONAL SERVICES 2021	CONSTRUCTION <i>(If applicable)</i> 2021
c. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Utility Plan development for 1-mile of 4-lane driveway from SR 40 to WEC. Project included water distribution and sewer collection/transmission system extensions to serve existing WEC and future commercial developments fronting on SR 40. Integrated water and sewer modeling.		
SW 40th/49th Phase 1 Roadway Improvements in Ocala, FL	PROFESSIONAL SERVICES 2024	CONSTRUCTION <i>(If applicable)</i> TBD
d. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Awarded continuing contract for the design and permitting of 1.6-miles of 4-lane divided highway with urban section, two mast arm signalized intersections, and multiple stormwater management facilities along the corridor. Scope included: project management, sub-consultant management (survey, traffic, transportation, environmental, ecological and geotec).		
SR 40 Turn Lanes and Entrance Driveway to World Equestrian Center (WEC) in Ocala, FL	PROFESSIONAL SERVICES 2021	CONSTRUCTION <i>(If applicable)</i> 2021
e. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Project consisted of two right turn lanes and improved intersections on SR 40 plus 1.1-miles of four lane roadway from SR 40 to WEC with grassed median, golf cart path, roadside swales, piped storm conveyance system, stormwater management facilities, and landscape and irrigation infrastructure.		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME Kevin L. Atchley, P.E.	13. ROLE IN THIS CONTRACT Professional Engineer	14. YEARS EXPERIENCE	
		a. TOTAL 30	b. WITH CURRENT FIRM 5.5

15. FIRM NAME AND LOCATION *(City and State)*
Tillman & Associates Engineering, LLC in Ocala, FL

16. EDUCATION <i>(Degree and Specialization)</i> Bachelor of Science, Civil Engineering, Florida State University - April 1994	17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Registered Professional Engineer in Florida #53119
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18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*
AutoCad Civil 3D 2022, AdICPR Stormwater Modeling, PONDS Stormwater Modeling, Stormwater Studio, Atlas (Analysis of Traffic Lights & Signal Poles), MS Office.
Affiliations: Florida Engineering Society

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i> World Equestrian Center RV Park Phase 2 & Fuel Station in Ocala, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2020	CONSTRUCTION <i>(If applicable)</i> 2021
a. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Project consisted of designing and permitting a 130 lot RV park and adjacent 12 pump fuel station. Included permitting with Marion County, FDEP (water and sewer) and SWFWMD. Tasks included all grading and stormwater modeling.	<input checked="" type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> 27 West Commercial Center Replat, Ocala Horse Properties Office in Ocala, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2021	CONSTRUCTION <i>(If applicable)</i> 2022
b. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Project consisted of designing a commercial center with three lots with the development of one with a proposed office building and two out parcels. Included permitting with Marion County, City of Ocala Utilities, FDEP (water and sewer), FDOT stormwater, and SWFWMD. Tasks included all layout, grading, utilities, and stormwater modeling.	<input checked="" type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> Marion County DRA 3559 Repair in Ocala, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2021	CONSTRUCTION <i>(If applicable)</i> 2021
c. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Project consisted of reviewing geotechnical reports, identifying ground anomalies and making recommendations to try and minimize future sink hole activity after proposed FDOT road project. Project included identifying areas in the existing DRA that needed to be addressed, modifying the permit with SJRWMD and overseeing repairs.	<input checked="" type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> Brookhaven (fka Marion 60th), SW 60th Avenue in Ocala, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2019	CONSTRUCTION <i>(If applicable)</i> 2021
d. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Drainage and Design Engineer for the design and permitting of a 330 lot residential subdivision on 95 acres. Responsible for designing per Marion County and SWFWMD standards and permitting. Design and analyze storm sewer system and resolve conflicts with sanitary sewer system. Included replacing and providing compensating storage.	<input checked="" type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> SunKool Main Warehouse in Wildwood, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2017	CONSTRUCTION <i>(If applicable)</i> 2019
e. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Project Engineer for the design and permitting of a 12,000 sq.ft. warehouse building with associated asphalt, concrete and storm water drainage system on a portion of a 5 acre site. Responsible for designing per City of Wildwood and SWFWMD standards and permitting. Design and permit site plan, including storm sewer system, dry retention area.	<input type="checkbox"/> Check if project performed with current firm	

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME Rob Quinney, P.E.	13. ROLE IN THIS CONTRACT Professional Engineer	14. YEARS EXPERIENCE	
		a. TOTAL 13	b. WITH CURRENT FIRM 2
15. FIRM NAME AND LOCATION <i>(City and State)</i> Tillman & Associates Engineering, LLC in Ocala, FL			
16. EDUCATION <i>(Degree and Specialization)</i> Bachelors of Science, Civil Engineering, University of Alabama - 2012		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Registered Professional Engineer in Florida #91892	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i> Certified Professional Home Inspector, InterNACHI, Issued 05/2022			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i> Civil Project Engineer: World Equestrian Center and Golden Ocala Lakeside Residential in Marion County, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES On-going	CONSTRUCTION <i>(If applicable)</i> On-going
a. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE In development of a world class 1,000 acre + facility, Rob has provided over 2 years of civil design and permitting support to the World Equestrian Center just west of Ocala, FL. Rob's diverse multi-discipline background is key to the commercial and residential development in coordinating with architects and construction.	<input checked="" type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> Civil Project Engineer: R+L Carriers Ocala Truck Terminal in Ocala, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2022	CONSTRUCTION <i>(If applicable)</i> 2023
b. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Civil design & permitting a 50-acre truck terminal is no snap of the finger task. Rob's role included coordinating with architect and consultants for utilities and environmental of the maintenance shop, truck wash, fuel station, propane station, & truck terminal. Rob helped design site layout, stormwater, security fencing, and other various civil activities.	<input checked="" type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> Civil design EI: Safer Routes to School, 5 various schools in South Carolina	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2017	CONSTRUCTION <i>(If applicable)</i> 2019
c. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE To relieve traffic congestion and make safer paths to a facility is a win-win for a community. In his role of the Safer Routes to School project, Rob planned for ADA and bike paths, signage, and pavement markings, provided civil plans and calculations, coordinated easements for access and construction, and performed utility relocation coordination.	<input type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> Civil design EI, notable projects: Ocala Wetland Recharge Park (Ocala, FL), Orange County Landfill Cell 11 (Orange County, FL),	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2019	CONSTRUCTION <i>(If applicable)</i> 2020
d. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Environmental design, permitting, and inspection services are roles Rob has held in past jobs. In the Ocala Wetland Recharge Park and Orange County Landfill Cell 11 projects, Rob also provided multi-discipline design coordination, environmental resource permitting, grading design, and SWPPP preparation.	<input type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> Stormwater design EI: Floodplain studies for: Pabor Lake, Frostproof, FL Duck Creek, Toledo, OH Big Davis Creek, Jacksonville, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 20	CONSTRUCTION <i>(If applicable)</i>
e. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE From industrial facilities like Nucor Steel near Pabor Lake to residential developments like eTown along Big Davis Creek, improvements within flood plains require special engineering services to prevent buildings from being flooded. Rob has performed floodplain studies to help clients determine earthwork needs to stay high and dry.	<input type="checkbox"/> Check if project performed with current firm	

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME Jon R. Phillips, PLA	13. ROLE IN THIS CONTRACT Professional Landscape Architect	14. YEARS EXPERIENCE	
		a. TOTAL 26	b. WITH CURRENT FIRM 10
15. FIRM NAME AND LOCATION <i>(City and State)</i> Tillman & Associates Engineering, LLC in Ocala, FL			
16. EDUCATION <i>(Degree and Specialization)</i> Master of Landscape Architecture, University of Florida 1997		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Florida Registered Professional Landscape Architect # LA6666960	

18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*
Affiliations: American Society of Landscape Architects (ASLA) Software: AutoCAD Civil 3D, ArcGIS, Photoshop, Excel

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i> Pioneer Ranch in Ocala, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
a. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Master plan design support to planner and engineer for 260 ac planned development. 6,300 LF of planting and irrigation design with permits for roadway and buffer landscape.		
(1) TITLE AND LOCATION <i>(City and State)</i> Freedom Commons in Ocala, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
b. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Master plan design support to planner and engineer for 330 acre planned development. 11,000 LF planting and irrigation design and permits for roadway and buffer landscape.		
(1) TITLE AND LOCATION <i>(City and State)</i> On Top of the World, Longleaf Ridge in Ocala, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
c. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Master plan and layout of 700 acre residential neighborhoods, roadways, conservation areas, and DRAs with 1,500 home sites. Performed analysis of topography, hydrology, vegetation. Coordinated with engineers during design development of drainage design, utilities, and tree preservation. Planting and irrigation design and permits.		
(1) TITLE AND LOCATION <i>(City and State)</i> West Oak Redevelopment in Ocala, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
d. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Site plan analysis and design for 218 acre conversion of existing golf course into cohesive planned residential and commercial community with single and multi-family home sites, apartments, recreation, and commercial areas. Coordinated with engineers to address existing wet ponds and off-site uses. Met developer's unit requirements.		
(1) TITLE AND LOCATION <i>(City and State)</i> Housing Trust Group Oak Valley Residential in Ocala, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
e. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Site plan concepts for 15 acre senior residential apartments. Coordinated with engineers for tree preservation, DRA location, and natural area protection. Provided planting and irrigation design and permits. Coordinated with architect to provide hardscape design and grading, and drainage design for courtyard hardscape areas.		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME Robbie Stroub, E.I.	13. ROLE IN THIS CONTRACT Engineer Intern	14. YEARS EXPERIENCE	
		a. TOTAL 3	b. WITH CURRENT FIRM 2
15. FIRM NAME AND LOCATION <i>(City and State)</i> Tillman & Associates Engineering, LLC in Ocala, FL			
16. EDUCATION <i>(Degree and Specialization)</i> Bachelor of Science, Mathematics & Physics, The University of the Cumberland - 2019 Bachelor of Science, Civil Engineering, The University of Kentucky - 2021		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Florida - E.I. (Engineer Intern)	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i> Software: AutoCAD, Civil3D, AdICPR, PONDS, WaterCAD, Storm Water Studio.			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i> Freedom Commons SW 82nd Place Road in Ocala, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2022	CONSTRUCTION <i>(If applicable)</i> 2023
a. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Designer - Project consisted of approximately 0.8 miles of a two-lane divided roadway, but was designed so that the inside median could be widened for future four-lane. Roadway included: grassed median, multi-modal path, sidewalk, roundabout, turn lanes, and associated stormwater management system and utilities.	<input checked="" type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> Bellehaven Spine Road (SE 102nd Place Road) in Belleview, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2023	CONSTRUCTION <i>(If applicable)</i>
b. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Assistant Project Engineer and Designer - Project consisted of approximately 0.77 miles of a two-lane undivided roadway. Roadway includes: Turn lanes, temporary roadside swales, sidewalk, and associated stormwater management system and utilities.	<input checked="" type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> Summer Pointe Village Phase 1A in Summerfield, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2022-2023	CONSTRUCTION <i>(If applicable)</i>
c. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Assistant Project Engineer and Designer - Project consisted of a 252 multi-family unit Major Site Plan which included the design and review of associated stormwater management system, utilities (lift station, gravity sewer, force main, and water), and grading.	<input checked="" type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> Freedom Commons Phase 2 in Ocala, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2022	CONSTRUCTION <i>(If applicable)</i> 2023-2024
d. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Assistant Project Engineer and Designer - Project consisted of a 166 single-family unit Improvement Plan which included the design and review of associated stormwater management system, utilities (lift station, gravity sewer, force main, and water), grading, and tie-ins to existing infrastructure.	<input checked="" type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> Pioneer Ranch Phase 2 in Ocala, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2023-2024	CONSTRUCTION <i>(If applicable)</i>
e. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Assistant Project Engineer and Designer- Project consisted of a 189 single-family unit Improvement Plan which included designing around relic sinkholes along with the design and review of associated stormwater management system, utilities (gravity sewer to existing lift station and water), grading, and tie-ins to existing infrastructure.	<input checked="" type="checkbox"/> Check if project performed with current firm	

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 1
21. TITLE AND LOCATION <i>(City and State)</i> Freedom Commons Ph 1 & 2 in Ocala, FL	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Freedom Commons Development LLC	b. POINT OF CONTACT NAME Chris Armstrong	c. POINT OF CONTACT TELEPHONE NUMBER 352-624-0120
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

This 49.9 acre project consists of 322 residential lots, and 1.08 total miles of roadway.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
a.			
b.			
c.			
d.			
e.			
f.			

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 2
21. TITLE AND LOCATION <i>(City and State)</i> Freedom Commons SW 82nd Pl Rd in Ocala, FL	22. YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION <i>(if applicable)</i>	

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Freedom Commons Development LLC	b. POINT OF CONTACT NAME Chris Armstrong	c. POINT OF CONTACT TELEPHONE NUMBER 352-624-0120
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

Freedom Commons Spine Road is 120' ROW, with total ROW area at 10.56 acres and total project area is 26.36 acres. Project consisted of design and permitting of approximately .8 miles of two lane divided roadway (designed to allow for future expansion to four lane) with grassed median, sidewalk, multi-modal path, turn lanes, roundabout intersection, stormwater management systems, and utility extensions.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>	20. EXAMPLE PROJECT KEY NUMBER 3
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21. TITLE AND LOCATION <i>(City and State)</i> On Top of the World Longleaf Ridge Ph 3-8 in Ocala, FL	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER On Top of the World Communities LLC	b. POINT OF CONTACT NAME Kenneth Colen	c. POINT OF CONTACT TELEPHONE NUMBER 866-228-5878
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

Construction of a 66.1 acre, 161 lot residential subdivision. Includes construction of internal access roadways, driveways, internal stormwater collection and conveyance system, and related infrastructure. EOR.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
a.			
b.			
c.			
d.			
e.			
f.			

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>	20. EXAMPLE PROJECT KEY NUMBER 4
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21. TITLE AND LOCATION <i>(City and State)</i> On Top of the World Weybourne Phase A-D and Ph 2 in Ocala, FL	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER On Top of the World Communities LLC	b. POINT OF CONTACT NAME Kenneth Colen	c. POINT OF CONTACT TELEPHONE NUMBER 866-228-5878
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*
Construction of 80 residential lots, internal roadways, a conveyance swale, and associated infrastructure.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>	20. EXAMPLE PROJECT KEY NUMBER 5
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21. TITLE AND LOCATION <i>(City and State)</i> Calesa Roan Hills Phase 1 & 2 and Sorrel Glen Ph 1 & 2 in Ocala, FL	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER On Top of the World communities, LLC	b. POINT OF CONTACT NAME Kenneth Colen	c. POINT OF CONTACT TELEPHONE NUMBER 866-228-5878
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*
Construction of 893 residential lots, roadways, driveways, sidewalks and associated structures.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 6
21. TITLE AND LOCATION <i>(City and State)</i> Summer Pointe Village Ph 1A in Ocala, FL	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Villages of Marion County GP, LLC	b. POINT OF CONTACT NAME Ezra Stark / Julianne Greco	c. POINT OF CONTACT TELEPHONE NUMBER 216-464-2860
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

This project consists of 236 Residential lots, 1.49 miles of roadway, 38.49 acres of project area. Also, a Spine Road and additional phases.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
a.			
b.			
c.			
d.			
e.			
f.			

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 7
21. TITLE AND LOCATION (City and State) On Top of the World Earl Township Roadway Extension in Ocala, FL	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER On Top of the World Communities, LLC	b. POINT OF CONTACT NAME Kenneth Colen	c. POINT OF CONTACT TELEPHONE NUMBER 866-228-5878
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

Project consisted of design and permitting of approximately 2.2 miles of two lane divided roadway (designed to allow for future expansion to four lane) with grassed median, sidewalk, multi-modal path, turn lanes, stormwater management systems, and utility extensions.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 8
21. TITLE AND LOCATION <i>(City and State)</i> Pioneer Ranch Ph 2 in Ocala, FL	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(if applicable)</i>

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER 95th Street Holdings, LLC	b. POINT OF CONTACT NAME Chris Armstrong	c. POINT OF CONTACT TELEPHONE NUMBER 352-624-0120
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

This 57.41 acre project consists of 189 residential lots, and 1.32 total miles of roadway.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
a.			
b.			
c.			
d.			
e.			
f.			

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 9
21. TITLE AND LOCATION <i>(City and State)</i> Liberty Village Residential Development in Ocala, FL		22. YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION <i>(if applicable)</i>

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER AG Essential Housing Multi State 2 LLC	b. POINT OF CONTACT NAME Orlando Figueroa	c. POINT OF CONTACT TELEPHONE NUMBER 212-692-2000
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

This project is for a .82 acre Amenity Center.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 10
21. TITLE AND LOCATION <i>(City and State)</i> World Equestrian Center (WEC) in Ocala, FL	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES 2020	CONSTRUCTION <i>(if applicable)</i> 2020

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Equestrian Operations, LLC	b. POINT OF CONTACT NAME Mary Roberts	c. POINT OF CONTACT TELEPHONE NUMBER 352-402-4368
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

Master water and wastewater system planning & modeling developed a phased WaterGEMS Hydraulic Model of the existing and future Golden Ocala dev., proposed W.E.C. dev., and proposed watermain interconnect to the Trilogy WTP. Identified key improvements for each phase. Developed a Wastewater Model of the proposed lift stations.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
a.			
b.			
c.			
d.			
e.			
f.			

G. KEY PERSONNEL PARTICIPATION IN EXAMPLE PROJECTS

26. NAMES OF KEY PERSONNEL <i>(From Section E, Block 12)</i>	27. ROLE IN THIS CONTRACT <i>(From Section E, Block 13)</i>	28. EXAMPLE PROJECTS LISTED IN SECTION F <i>(Fill in "Example Projects Key" section below before completing table. Place "X" under project key number for participation in same or similar role.)</i>									
		1	2	3	4	5	6	7	8	9	10
J. David Tillman, P.E.	Professional Engineer	X	X	X	X	X	X	X	X	X	X
Jeffrey McPherson, P.E.	Professional Engineer			X	X	X		X			X
Timothy Brooker, P.E.	Professional Engineer	X	X				X		X	X	
George Horton, P.E.	Professional Engineer										X
Kevin Atchley, P.E.	Professional Engineer										X
Rob Quinney, P.E.	Professional Engineer										X
Jon Phillips, PLA	Professional Landscape Architect	X					X		X	X	
Robbie Stroub, E.I.	Engineer Intern	X	X				X		X		

29. EXAMPLE PROJECTS KEY

NUMBER	TITLE OF EXAMPLE PROJECT <i>(From Section F)</i>	NUMBER	TITLE OF EXAMPLE PROJECT <i>(From Section F)</i>
1	Freedom Commons Ph 1 & 2	6	Summer Pointe Village Ph 1A
2	Freedom Commons SW 82nd PI Rd	7	OTOW Earl Township Roadway Extension
3	On Top of the World Longleaf Ridge Ph 3-8	8	Pioneer Ranch Ph 2
4	On Top of the World Weybourne Ph A-D & Ph 2	9	Liberty Village Residential Development
5	Calesa Roan Hills 1 & 2 and Sorrel Glen Ph 1 & 2	10	Golden Ocala - World Equestrian Center

H. ADDITIONAL INFORMATION

30. PROVIDE ANY ADDITIONAL INFORMATION REQUESTED BY THE AGENCY. ATTACH ADDITIONAL SHEETS AS NEEDED.

I. AUTHORIZED REPRESENTATIVE

The foregoing is a statement of facts.

31. SIGNATURE



32. DATE

03/07/2024

33. NAME AND TITLE

Jeffrey McPherson, P.E.

ARCHITECT-ENGINEER QUALIFICATIONS

1. SOLICITATION NUMBER (if any)

PART II - GENERAL QUALIFICATIONS

(If a firm has branch offices, complete for each specific branch office seeking work.)

2a. FIRM (or Branch Office) NAME Tillman & Associates Engineering, LLC			3. YEAR ESTABLISHED 2005	4. UNIQUE ENTITY IDENTIFIER 617906107
2b. STREET 1720 SE 16th Ave., Bldg. 100			5. OWNERSHIP	
2c. CITY Ocala	2d. STATE FL	2e. ZIP CODE 34471	a. TYPE Limited Liability Company	
6a. POINT OF CONTACT NAME AND TITLE Timothy C. Brooker, P.E.			b. SMALL BUSINESS STATUS NAICS: 541330	
6b. TELEPHONE NUMBER 352-387-4540		6c. EMAIL ADDRESS permits@tillmaneng.com		
8a. FORMER FIRM NAME(S) (if any)			8b. YEAR ESTABLISHED	8c. UNIQUE ENTITY IDENTIFIER

8a. FORMER FIRM NAME(S) (if any)	8b. YEAR ESTABLISHED	8c. UNIQUE ENTITY IDENTIFIER
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9. EMPLOYEES BY DISCIPLINE				10. PROFILE OF FIRM'S EXPERIENCE AND ANNUAL AVERAGE REVENUE FOR LAST 5 YEARS		
a. Function Code	b. Discipline	c. Number of Employees		a. Profile Code	b. Experience	c. Revenue Index Number (see below)
		(1) FIRM	(2) BRANCH			
02	Administrative	3		H07	Highways; Streets; Parking Lots	2
08	CADD Tech/E.I.	10		H10	Hotels; Motels	1
12	Civil Engineer	7		I01	Industrial Bldgs; Manufacturing	1
39	Landscape Architect	1		I06	Irrigation; Drainage	2
	Permit Coordinator	3		L03	Landscape Architecture	2
				O01	Office Bldgs; Industrial Parks	1
				P06	Planning (Site, Installation & Project)	2
				R06	Rehabilitation	1
				S04	Sewage Coll., Treatment & Disposal	2
				S09	Structural Design	1
				S13	Storm Water Handling & Facilities	3
				T02	Testing & Inspection Services	2
				T03	Traffic & Inspection Services	2
				W01	Warehouses & Depots	1
				W02	Water Resources; Hydrology	2
				W03	Water Supply; Distribution	2
	Other Employees					
	Total	24				

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

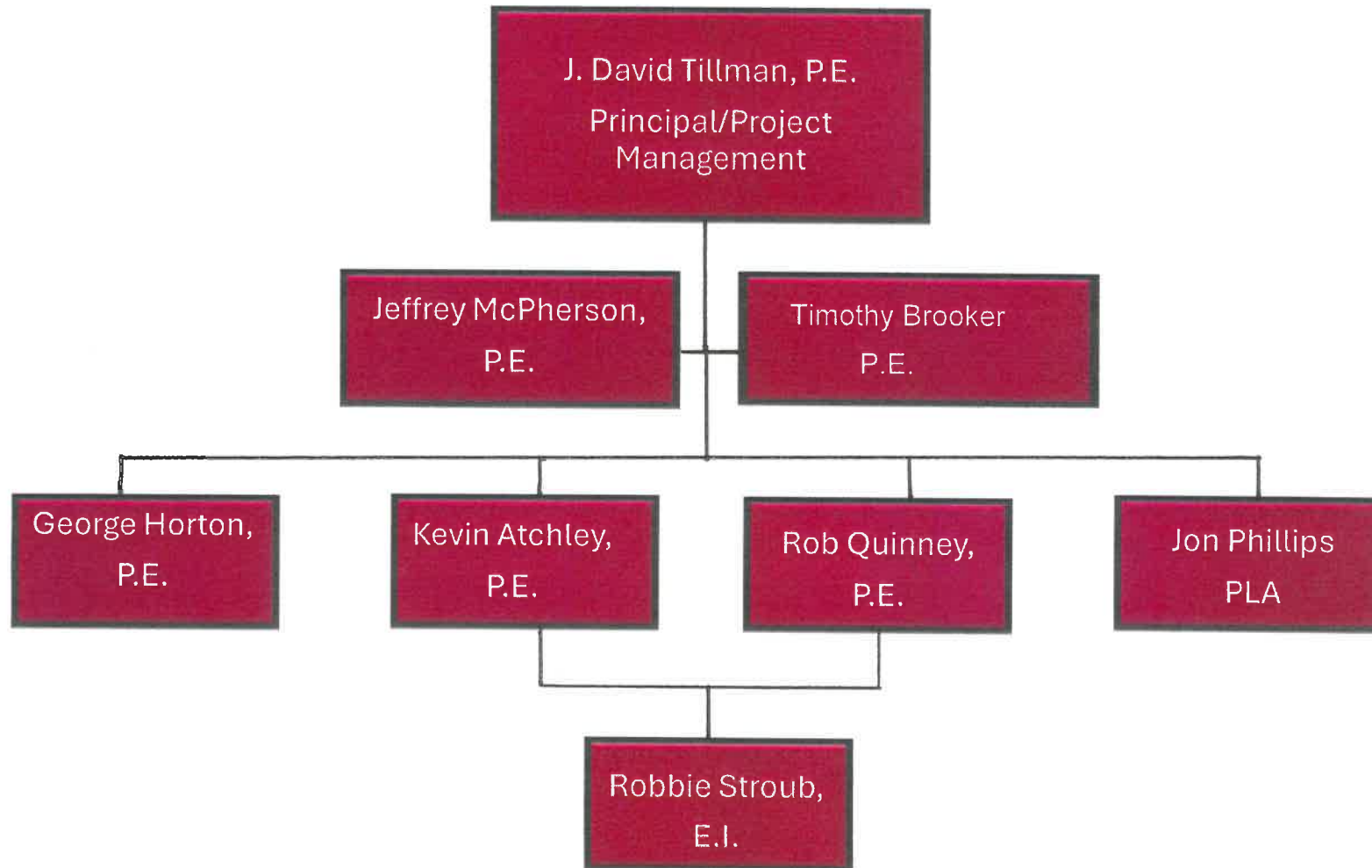
12. AUTHORIZED REPRESENTATIVE

The foregoing is a statement of facts.

a. SIGNATURE 	b. DATE 03/07/2024
c. NAME AND TITLE Jeffrey McPherson, P.E.	

Tillman & Associates

ENGINEERING, LLC.



**MARION RANCH COMMUNITY DEVELOPMENT DISTRICT
DISTRICT ENGINEER REQUEST FOR QUALIFICATIONS
COMPETITIVE SELECTION SCORING SHEET**

Criteria		Banks Engineering
<p>1) Ability and Adequacy of Professional Personnel (Weight: 30 Points)</p> <p>Consider the capabilities and experience of key personnel within the firm including certification, training, and education; affiliations and memberships with professional organizations; etc.</p>		
<p>2) Consultant's Past Experience (Weight: 30 Points)</p> <p>Past performance for other Community Development Districts in other contracts; amount of experience on similar projects, particularly in relationship to roadway design in this general area of Charlotte County and along this specific corridor.</p>		
<p>3) Geographic Location (Weight: 20 Points)</p> <p>Consider the geographic location of the firm's headquarters, offices and personnel in relation to the project.</p>		
<p>4) Willingness to Meet Time and Budget Requirements (Weight: 15 Points)</p> <p>Consider the consultant's ability and desire to meet time and budget requirements including staffing levels and past performance on previous projects; etc.</p>		
<p>5) Recent, Current and Projected Workloads (Weight: 5 Points)</p> <p>Consider the current and projected workloads of the firm.</p>		
TOTAL POINTS		

ENGINEERING SERVICES AGREEMENT

THIS ENGINEERING SERVICES AGREEMENT (this “Agreement”) is made and entered into as of this 11th day of April, 2024, by and between **MARION RANCH COMMUNITY DEVELOPMENT DISTRICT**, a local unit of special purpose government established and existing pursuant to Chapter 190, *Florida Statutes*, and the laws of the State of Florida (“District”) and **TILLMAN & ASSOCIATES ENGINEERING, LLC**. (d/b/a **Tillman & Associates**), a Florida corporation (“Engineer”).

WHEREAS, the District solicited for proposals to serve as the Engineer for the District in accordance with Sections 190.033 and 287.055, *Florida Statutes*; and

WHEREAS, the Engineer submitted a proposal to serve in this capacity; and

WHEREAS, the District’s Board of Supervisors ranked the Engineer as the number one most qualified firm to serve as the Engineer for the District and authorized negotiation of a contract; and

WHEREAS, the District intends to employ the Engineer to perform engineering, surveying, planning, landscaping, environmental management and permitting, and such other services as deemed necessary by the District, as defined in separate work authorizations; and

WHEREAS, the Engineer shall serve as the District’s professional representative in each service or project to which this Agreement applies and will provide the required services defined in separate work authorizations to the District during the performance of his services.

NOW THEREFORE, for and in consideration of the premises, the mutual covenants herein contained, the act and deeds to be performed by the parties, the receipt and sufficiency of which are hereby acknowledged, it is mutually covenanted and agreed as follows:

ARTICLE 1. SCOPE OF SERVICES.

A. The Engineer will provide general engineering services, as authorized by the Board of Supervisors and supervised by the District’s Manager or directed by the District Manager, including:

- 1.** Prepare any necessary reports and attend meetings of the District’s Board of Supervisors; and
- 2.** Assistance in meeting with necessary parties pertaining to bond issues, special reports, feasibility studies or other tasks; and
- 3.** Performance of any other duties related to the provision of infrastructure and services.

B. The Engineer shall prepare construction drawings and specifications for the type of work as authorized by the Board of Supervisors of the District and directed by the

ENGINEERING SERVICES AGREEMENT

District's Manager. This may include rendering assistance in the drafting of forms, proposals and contracts, issuance of certificates of construction and payment, assisting and supervising the bidding processes, and any other activity required by the District.

C. The Engineer shall provide general services during the construction phase of a project as authorized by the District and supervised by the District's Manager which may include the following:

- 1.** Periodic visits to the site, or full-time services, as directed by the District; and
- 2.** Processing of contractors' pay estimates; and
- 3.** Final inspection and requested certificates for construction including the final certification of construction; and
- 4.** Consultation and advice during construction, including performing all roles and actions required of any construction contract between the District and any contractor(s) in which the Engineer is named as owner's representative or "Engineer"; and
- 5.** Any other activity related to construction as authorized by the District.
- 6.** Land surveying.
- 7.** Topographic surveying.
- 8.** Staking and layout work for construction.
- 9.** Tests of material and underground explorations; and
- 10.** Aerial photographs.

D. The Engineer will assign a project manager to the District, notifying the District in writing, which project manager shall be the primary contact person for the Engineer.

E. In those instances where the Engineer believes that a task, work, or project requires additional personnel, the Engineer shall obtain the prior written approval of the District. The Engineer shall optimize the resources available through the District staff before utilizing additional Engineer personnel.

F. Each project shall utilize standard project management methodology.

G. The District retains the right to at any time, without penalty or charge, suspend any previously authorized work, task or project, by providing written notice to the Engineer, provided however that the District shall be responsible to pay the Engineer for all authorized work performed prior to receipt by Engineer of the notice of suspension.

H. The District retains the right to obtain other engineering services.

I. The professional services to be provided by Engineer shall comply with all applicable laws, statutes, ordinances, codes, orders (including, without limitation, the

ENGINEERING SERVICES AGREEMENT

PUD Ordinance), rules and regulations, and shall be performed with the degree of care and diligence and in accordance with the professional standards of professional engineers practicing in the State of Florida. The services shall be performed within the standards of the industry. In the event of any conflict between the rules, regulations and ordinances promulgated by the various governmental authorities controlling construction of improvements, Engineer covenants and agrees that it will design such improvements in accordance with the standards of the industry.

ARTICLE 2. METHOD OF AUTHORIZATION/SCHEDULE.

A. Each service or project shall be authorized in writing by the District. The written authorization shall be incorporated in a Work Authorization that shall include the scope of work, compensation, and special provisions or conditions specific to the service or project being authorized. Authorization of services or projects under the contract shall be at the sole option of the District and as agreed to by the Engineer.

B. Engineer shall perform its obligations under this Agreement as expeditiously and efficiently as are consistent with professional skill and care and the orderly progress of the construction of the District's facilities and improvements and meet such project schedules as may be developed by District and consistent with information provided to Engineer by District and applicable government agencies. Engineer agrees that all services shall be provided in such a manner as to meet District's reasonable expectation and to provide Engineer's best efforts to ensure the timely progression of the work being performed by the District.

ARTICLE 3. COMPENSATION.

It is understood and agreed that the payment of compensation for services under this contract shall be stipulated in each Work Authorization. One of the following methods shall be utilized:

Lump Sum Amount. For services or projects where the District and Engineer mutually agree to a maximum lump sum amount for the services to be rendered payable monthly in direct proportion to the work accomplished.

Hourly Personnel Rates. For services or projects where the scope of services is not capable of being clearly defined or recurring services or other projects where the District desires the use of the hourly compensation rates, the services shall be charged at the Engineer's current and best rates, a current copy of which is outlined in Schedule A, attached hereto and made a part hereof. If requested by the District, Engineer shall provide the District with written updates of said rate schedule.

ENGINEERING SERVICES AGREEMENT

ARTICLE 4. REIMBURSABLE EXPENSES.

Reimbursable expenses consist of actual expenditures made by the Engineer, its employees, or its consultants in the interest of District authorized work for the incidental expenses listed as follows:

A. Expenses of transportation and living when traveling in connection with the project, for long distance calls and facsimiles, and fees paid for securing approval of authorities having jurisdiction over the Project. Requests for reimbursements for all such Expenditures shall be made in accordance with Chapter 112, Florida Statutes and with the District's travel policy.

B. Actual expense of reproduction, postage and handling of drawings, and specifications except those use for in-house purposes by Engineer.

ARTICLE 5. SPECIAL CONSULTANTS.

When authorized in writing by the District, additional special consulting services shall be paid for at the actual cost of the special consultant without any markup by the Engineer.

ARTICLE 6. BILLING AND ACCOUNTING RECORDS.

Bills for fees or other compensation for services or expenses shall be submitted in detail sufficient for a proper pre-audit and post-audit thereof. The Engineer, when billing based upon an hourly basis shall record the time expended in increments not less than two-tenths (.2) of an hour, with an accompanying detailed explanation for each time entry. Records of the Engineer pertaining to the services provided hereunder shall be kept on a basis of generally accepted accounting principles and shall be available to the District or its authorized representative for observation or audit at mutually agreeable times. The Engineer shall not charge for time expended in billing preparation or review or for internal administration of this Agreement. The Engineer acknowledges that the provisions of Article 14 of this Agreement may apply to such records.

ARTICLE 7. OWNERSHIP OF PLANS.

All plans produced by the Engineer shall immediately become property of the District.

ARTICLE 8. REUSE OF DOCUMENTS.

All documents including drawings and specifications furnished by the Engineer pursuant to this Agreement are instruments of service. They are not intended or represented to be suitable for reuse by the District or others on extensions of the work for which they were provided or on any other project. Any reuse without specific written consent by the Engineer will be at the District's sole risk and without liability or legal exposure to the Engineer.

ENGINEERING SERVICES AGREEMENT

ARTICLE 9. ESTIMATE OF COST.

Since the Engineer has no control over the cost of labor, materials or equipment, a contractor's(s') methods of determining prices, competitive bidding or market conditions, any opinions of probable cost provided as a service hereunder are to be made on the basis of his experience and qualifications and represent his best judgment as a design professional familiar with the construction industry, but the Engineer cannot and does not guarantee that proposals, bids, or the construction costs will not vary from opinion of probable cost prepared by the contractor. If the District wishes greater assurance as to the construction costs, it shall employ an independent cost estimator at its own expense. Services to modify approved documents to bring the construction cost within any limitation established by the District will be considered additional services and may justify additional fees.

ARTICLE 10. INSURANCE.

The Engineer shall, at its own expense, maintain insurance during the performance of its services under this Agreement, with limits of liability not less than the following:

Workers Compensation	Statutory
General Liability <ul style="list-style-type: none">• Bodily Injury (including Contractual)• Property Damage (including Contractual)	\$1,000,000/ \$2,000,000 \$1,000,000/ \$2,000,000
Automobile Liability (if Applicable) <ul style="list-style-type: none">• Bodily Injury• Property Damage	\$1,000,000/ \$1,000,000 \$1,000,000
Professional Liability for Errors and Omissions	\$1,000,000/\$3,000,000

The Engineer shall provide the District with a certificate evidencing compliance with the above terms and naming the District as an additional insured on general and automobile liability policies. The Engineer shall require that the insurer provide the District with thirty (30) days notice of cancellation and provide written certification thereof. At no time shall the Engineer be without insurance in the above amounts.

ARTICLE 11. CONTINGENT FEE.

The Engineer warrants that it has not employed or retained any company or person, other than a bona fide employee working solely for the Engineer, to solicit or secure this Agreement, and that it has not paid or agreed to pay any person, company, corporation, individual, or firm, other than a bona fide employee working solely for the Engineer, any fee, commission, percentage, gift, or other consideration contingent upon or resulting from the award or making of this Agreement.

ENGINEERING SERVICES AGREEMENT

ARTICLE 12. AUDIT.

The Engineer agrees that the District or any of its duly authorized representatives shall, until the expiration of five years after expenditure of funds under this Agreement, have access to and the right to examine any books, documents, papers, and records of the Engineer involving transactions related to the Agreement. The Engineer agrees that payment made under this Agreement shall be subject to reduction for amounts charged thereto that are found on the basis of audit examination not to constitute allowable costs. All required records shall be maintained until an audit is completed and all questions arising therefrom are resolved, or five years after completion of all work under the Agreement. At the end of said time period, the Engineer shall turn over District records to the District and will be reimbursed for the actual costs to do so.

ARTICLE 13. INDEMNIFICATION.

The Engineer agrees, to the fullest extent permitted by law, to indemnify, defend, and hold the District, its Board members, officers, agents, employees harmless of and from any and all liabilities, claims, costs, expenses, causes of action, demands, suits, or losses (including attorneys' fees and costs) arising from the negligent or wrongful acts, errors, or omissions, or the misconduct, of the Engineer, the Engineer's agents, or its employees, in the performance of professional services under this Agreement. The Engineer agrees and covenants that nothing herein shall constitute or be construed as a waiver of the District's sovereign immunity pursuant to section 768.28, F.S. The terms and provisions of this Article shall survive the expiration or termination of this Agreement.

ARTICLE 14. PUBLIC RECORDS.

The Engineer agrees and understands that Chapter 119, Florida Statutes, may be applicable to documents prepared in connection with the work provided to the District by Engineer. The Engineer shall allow access to all documents, papers, letters, or other materials subject to the provisions of Chapter 119, F.S. The District shall have the right to unilaterally cancel this Agreement for refusal by the Engineer to allow public access to all documents, papers, letters, or other materials that are subject to the provisions of Chapter 119, F.S. and made or received by the Engineer in conjunction with this Agreement.

ARTICLE 15. EMPLOYMENT VERIFICATION.

The Engineer agrees that it shall bear the responsibility for verifying the employment status, under the Immigration Reform and Control Act of 1986, of all persons it employs in the performance of this Agreement.

ARTICLE 16. CONTROLLING LAW.

ENGINEERING SERVICES AGREEMENT

The Engineer and the District agree that this Agreement shall be controlled and governed by the laws of the State of Florida. The parties to this Agreement acknowledge venue as lying in Marion County, Florida and further agree that all litigation arising out of this Agreement or the services provided hereunder shall be in the Florida state court of appropriate jurisdiction in Marion County, Florida.

ARTICLE 17. ASSIGNMENT AND AMENDMENT.

Neither the District nor the Engineer shall assign, sublet, or transfer any rights under or interest in this Agreement without the express written consent of the other. Nothing in this paragraph shall prevent the Engineer from employing such independent professional associates and consultants, as the Engineer deems appropriate, pursuant to Article 5 herein. Amendment to and waivers of the provisions contained in this Agreement may be made only by an instrument in writing which is executed by both of the parties hereto.

ARTICLE 18. TERMINATION.

This Agreement shall commence upon execution of this Agreement by both parties and shall continue until terminated in accordance with the provisions herein. The District may terminate this Agreement, in whole or in part, for non-performance by the Engineer or for convenience and without cause, at the District's discretion, by providing thirty (30) days written notice to the Engineer of the District's intent to terminate. The Engineer may terminate this Agreement without cause upon ninety (90) days written notice. At such time as the Engineer receives notification of the intent of the District to terminate the Agreement, the Engineer shall not perform any further services unless directed to do so by the Board of Supervisors. In the event of any termination, the Engineer will be paid for services rendered to the date of termination and all reimbursable expenses incurred to the date of termination.

ARTICLE 19. RECOVERY OF COSTS AND FEES.

In the event either party is required to enforce this Agreement by court proceedings or otherwise, to the extent permitted by law, the prevailing party shall be entitled to recover from the other party its reasonable attorneys' fees and costs, including those associated with any appeal.

ARTICLE 20. INDEPENDENT CONTRACTOR.

In all matters relating to this Agreement, the Engineer shall be acting as an independent contractor. Neither the Engineer nor employees of the Engineer, if any, are employees of the District under the meaning or application of any federal or state Unemployment or Insurance Laws or Old Age Laws or otherwise. The Engineer agrees to assume all liabilities or obligations imposed by anyone or more of such laws with respect to employees of the Engineer, if any, in the performance of this Agreement. The Engineer shall not have any authority to assume or create any obligation, expressed or implied, on behalf of the District and the Engineer shall have

ENGINEERING SERVICES AGREEMENT

no authority to represent as agent, employee, or in any other capacity the District unless set forth differently herein.

ARTICLE 21. NOTICES.

Any notice provided by this Agreement to be served in writing upon either of the parties shall be deemed sufficient if hand delivered, sent by commercial overnight courier, or mailed by registered or certified mail, return receipt requested, to the authorized representative of the other party at the addresses below or to such other addresses as the parties hereto may hereafter designate in writing. Any such notice or demand shall be deemed to have been given or made as of the time of actual delivery, or, in the case of certified mailing, such notice shall be effective from the date the same is deposited in the mail with postage prepaid. The addresses for notice purposes are as follows:

IF TO ENGINEER:	Tillman & Associates Engineering, LLC. 1720 SE 16 th Avenue Building 100 Ocala, Florida 34471 Phone: (352)-387-4540 Attention: Mr. Timothy Brooker
IF TO DISTRICT:	Marion Ranch Community Development District 2301 NE 37 th Street Fort Lauderdale, Florida 33308 Phone: 954-658-4900 E-Mail: JimWard@JimWardAssociates.com Attention: Mr. James P. Ward
WITH A COPY TO:	Coleman, Yovanovich & Koester, P.A. 4001 Tamiami Trail N., Suite 300 Naples, Florida 34103 Phone: 239-435-3535 E-Mail: gurbancic@cyklawfirm.com Attention: Mr. Greg Urbancic

ARTICLE 21. OBJECTIVE CONSTRUCTION AND ACCEPTANCE.

This Agreement reflects the negotiated agreement of the parties, each represented by competent legal counsel. Accordingly, this Agreement shall be construed as if both parties jointly prepared it, and no presumption against one party or the other shall govern the interpretation or construction of any of the provisions of this Agreement. Acceptance of this Agreement is indicated by the signature of the authorized representative of the District and the Engineer in the spaces provided below.

ENGINEERING SERVICES AGREEMENT

ARTICLE 22. SEVERABILITY.

Should any clause, paragraph, or other part of this Agreement be held or declared void or illegal, for any reason, by any court having competent jurisdiction, all other clauses, paragraphs or parts of this Agreement shall nevertheless remain in full force and effect.

ARTICLE 23. ACCEPTANCE.

Acceptance of this Agreement is indicated by the signature of the authorized representative of the District and the Engineer in the spaces provided below.

{Signatures appear on the following page}

ENGINEERING SERVICES AGREEMENT

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed as of the day and year first above written.

DISTRICT:

ATTEST:

**MARION RANCH COMMUNITY DEVELOPMENT
DISTRICT**

James P. Ward, Secretary

By: _____
_____, Chairman

ENGINEER:

Tillman & Associates Engineering, LLC.,
a Florida corporation

By: _____
Name: _____
Position: _____

ENGINEERING SERVICES AGREEMENT

SCHEDULE A

SCHEDULE "A"
RATESCHEDULE

2024 HOURLY RATE SCHEDULE	
Professional Engineer V	\$310.00 /hour
Professional Engineer IV	\$240.00 /hour
Professional Engineer III	\$215.00 /hour
Professional Engineer II	\$195.00 /hour
Professional Engineer I	\$165.00 /hour
Engineer In Training II	\$135.00 /hour
Engineer In Training I	\$120.00 /hour
Landscape Architect III	\$130.00 /hour
Landscape Architect II	\$120.00 /hour
Landscape Architect I	\$110.00 /hour
Engineer Technician V	\$195.00 /hour
Engineer Technician IV	\$150.00 /hour
Engineer Technician III	\$130.00 /hour
Engineer Technician II	\$115.00 /hour
Engineer Technician I	\$95.00 /hour
Planning Technician III	\$145.00 /hour
Planning Technician II	\$120.00 /hour
Planning Technician I	\$100.00 /hour
Field Representative II	\$105.00 /hour
Field Representative I	\$85.00 /hour
Technical Support / Analyst IV	\$155.00 /hour
Technical Support / Analyst III	\$140.00 /hour
Technical Support / Analyst II	\$125.00 /hour
Technical Support / Analyst I	\$95.00 /hour
Clerical / Permit Coordinator III	\$95.00 /hour
Clerical / Permit Coordinator II	\$85.00 /hour
Clerical / Permit Coordinator I	\$75.00 /hour
Copies, Mailings, Prints, etc.	Cost + 15%
Mileage	Federal Business Rate
Subconsultant Markup	Cost + 10%

RESOLUTION 2024-25

THE ANNUAL APPROPRIATION RESOLUTION OF THE PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT (THE “DISTRICT”) RELATING TO THE ANNUAL APPROPRIATION AND ADOPTING THE BUDGET FOR FISCAL YEAR 2024 (PARTIAL YEAR) BEGINNING JANUARY 23, 2024, AND ENDING SEPTEMBER 30, 2024.

RECITALS

WHEREAS, the District Manager has submitted to the Board of Supervisors (the “Board”) a proposed budget for the current and budget year along with an explanatory and complete financial plan for each fund of the Pioneer Ranch Community Development District, pursuant to the provisions of Section 190.008(2)(a), *Florida Statutes*; and

WHEREAS, at least sixty (60) days prior to the adoption of the proposed annual budget (the “Proposed Budget”), the District filed a copy of the Proposed Budget with the local governing authorities having jurisdiction over the area included in the District pursuant to the provisions of Section 190.008(2)(b), *Florida Statutes*; and

WHEREAS, the Board set April 16, 2024, as the date for a public hearing thereon and caused notice of such public hearing to be given by publication pursuant to Section 190.008(2)(a), *Florida Statutes*; and

WHEREAS, Section 190.008(2)(a), *Florida Statutes*, requires that, prior to October 1st of each year, the District Board by passage of an “Annual Appropriation Resolution” shall adopt a budget for the ensuing fiscal year and appropriate such sums of money as the Board deems necessary to defray all expenditures of the District during the ensuing fiscal year; and

WHEREAS, the District Manager has prepared a Proposed Budget, whereby the budget shall project the cash receipts and disbursements anticipated during a given time, including reserves for contingencies for emergency or other unanticipated expenditures during the fiscal year.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT:

SECTION 1. BUDGET.

- a. That the Board of Supervisors has reviewed the District Manager’s Proposed Budget, a copy of which is on file with the office of the District Manager and at the District’s Records Office, and hereby approves certain amendments thereto, as shown in Section 2 below.
- b. That the District Manager’s Proposed Budget, attached hereto as Exhibit “A,” as amended by the Board pursuant to the adoption of this Annual Appropriation Resolution (and as amended by the District Manager, as permitted), is hereby adopted in accordance with the provisions of Section 190.008(2)(a), *Florida Statutes*,

RESOLUTION 2024-25

THE ANNUAL APPROPRIATION RESOLUTION OF THE PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT (THE "DISTRICT") RELATING TO THE ANNUAL APPROPRIATION AND ADOPTING THE BUDGET FOR FISCAL YEAR 2024 (PARTIAL YEAR) BEGINNING JANUARY 23, 2024, AND ENDING SEPTEMBER 30, 2024.

and incorporated herein by reference; provided, however, that the comparative figures contained in the adopted budget may be subsequently revised as deemed necessary by the District Manager to reflect actual revenues and expenditures and/or revised projections.

- c. That the adopted budget, as amended, shall be maintained in the office of the District Manager and at the District's Records Office and identified as "The Budget for Pioneer Ranch Community Development District for the Fiscal Year 2024 ending September 30, 2024, as adopted by the Board of Supervisors on April 16, 2024.

SECTION 2. APPROPRIATIONS. There is hereby appropriated out of the revenues of the Pioneer Ranch Community Development District, for the Fiscal Year 2024 beginning January 23, 2024, and ending September 30, 2024, the sum of **\$91,375.00** to be raised by the levy of assessments and otherwise, which sum is deemed by the Board of Supervisors to be necessary to defray all expenditures of the District during said budget year, to be divided and appropriated in the following fashion:

TOTAL GENERAL FUND 2024	\$ 91,375.00
-------------------------	---------------------

SECTION 4. SEVERABILITY. The invalidity or unenforceability of any one or more provisions of this Annual Appropriation Resolution shall not affect the validity or enforceability of the remaining portions of this Annual Appropriation Resolution, or any part thereof.

SECTION 5. CONFLICT. That all Sections or parts of Sections of any Resolutions, Agreements, or actions of the Board of Supervisors in conflict are hereby repealed to the extent of such conflict.

SECTION 6. EFFECTIVE DATE. This Annual Appropriation Resolution shall take effect upon the passage and adoption of this Annual Appropriation Resolution by the Board of Supervisors of the Pioneer Ranch Community Development District.

RESOLUTION 2024-25

THE ANNUAL APPROPRIATION RESOLUTION OF THE PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT (THE "DISTRICT") RELATING TO THE ANNUAL APPROPRIATION AND ADOPTING THE BUDGET FOR FISCAL YEAR 2024 (PARTIAL YEAR) BEGINNING JANUARY 23, 2024, AND ENDING SEPTEMBER 30, 2024.

PASSED AND ADOPTED this 16th day of April 2024.

ATTEST:

**PIONEER RANCH COMMUNITY
DEVELOPMENT DISTRICT**

James P. Ward, Secretary

Name: _____
Chairperson / Vice-Chairperson

Exhibit A: Fiscal Year 2024 Proposed Budget

Exhibit A
Fiscal Year 2024 Proposed Budget

Marion Ranch Community Development District
General Fund - Budget
Fiscal Year 2024

Description	FY 2024
Revenues and Other Sources	
Carryforward	\$ -
Interest Income - General Account	\$ -
Assessment Revenue	
Assessments - On-Roll	
Assessments - Off-Roll	
Contributions - Private Sources	
Lennar Homes	\$ 115,125
Total Revenue & Other Sources	<u>\$ 115,125</u>
Appropriations	
Legislative	
Board of Supervisor's Fees	\$ -
Board of Supervisor's - FICA	\$ -
Executive	
Professional - Management	\$ 40,000
Financial and Administrative	
Audit Services	\$ -
Accounting Services	\$ 16,000
Assessment Roll Preparation	\$ -
Arbitrage Rebate Fees	\$ -
Other Contractual Services	
Recording and Transcription	\$ -
Legal Advertising	\$ 7,500
Trustee Services	\$ -
Dissemination Agent Services	\$ -
Property Appraiser Fees	\$ -
Bank Service Fees	\$ 350
Travel and Per Diem	
Communications and Freight Services	
Telephone	\$ -
Postage, Freight & Messenger	\$ 1,500
Rentals and Leases	
Miscellaneous Equipment	\$ -
Computer Services (Web Site)	\$ 1,600
Insurance	\$ 6,500
Subscriptions and Memberships	\$ 175
Printing and Binding	\$ 1,500
Office Supplies	\$ -

Marion Ranch Community Development District
General Fund - Budget
Fiscal Year 2024

Description	FY 2024
Legal Services	
General Counsel	\$ 25,000
Other General Government Services	
Engineering Services	\$ 15,000
Contingencies	\$ -
Capital Outlay	\$ -
Reserves	
Operational Reserve (Future Years)	\$ -
Other Fees and Charges	
Discounts, Tax Collector Fee and Property Appraiser Fee	\$ -
Total Appropriations	<u><u>\$ 115,125</u></u>

RESOLUTION 2024-26

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT APPROVING A PROPOSED BUDGET FOR FISCAL YEAR 2025 AND SETTING A PUBLIC HEARING THEREON PURSUANT TO FLORIDA LAW; PROVIDING FOR SEVERABILITY; PROVIDING FOR CONFLICT AND PROVIDING FOR AN EFFECTIVE DATE.

RECITALS

WHEREAS, the District Manager has heretofore prepared and submitted to the Board of Supervisors of the Pioneer Ranch Community Development District (the "Board"), a proposed Budget for Fiscal Year 2025; and

WHEREAS, the Board has considered the proposed Budget and desires to set the required public hearing thereon.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT:

SECTION 1. INCORPORATION OF WHEREAS CLAUSES. That the foregoing "Whereas" clauses are true and correct and incorporated herein as if written into this Section.

SECTION 2. APPROVAL OF THE PROPOSED BUDGETS. The proposed Budget submitted by the District Manager for Fiscal Year 2025, attached hereto as **Exhibit A**, is hereby approved as the basis for conducting a public hearing to adopt said budget.

SECTION 3. DATE, TIME, AND LOCATION. A Public Hearing on said approved budget is hereby declared and set for the following date, hour, and location:

DATE: Tuesday, July 16, 2024
HOUR: 3:30 p.m.
LOCATION: Offices of Lennar Homes
2100 SE 17th Street, Suite 601
Ocala, Florida 34471

SECTION 4. SUBMITTAL OF BUDGET TO MARION COUNTY. The District Manager is hereby directed to submit a copy of the proposed budget to Marion County at least 60 days prior to the hearing set above. In accordance with Section 189.016, *Florida Statutes*, the District's Secretary is further directed to post the proposed budget on the District's website at least two days before the budget hearing date.

SECTION 5. NOTICE OF PUBLIC HEARING. Notice of this Public Hearing on the budget shall be published in a newspaper of general circulation, in the area of the district, once a week for two (2) consecutive weeks, except that the first publication shall not be fewer than 15 days prior to the date of the hearing. The notice shall further contain a designation of the day, time, and place of the public hearing. At the time and place designated in the notice, the Board shall

RESOLUTION 2024-26

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT APPROVING A PROPOSED BUDGET FOR FISCAL YEAR 2024 AND SETTING A PUBLIC HEARING THEREON PURSUANT TO FLORIDA LAW; PROVIDING FOR SEVERABILITY; PROVIDING FOR CONFLICT AND PROVIDING FOR AN EFFECTIVE DATE.

hear all objections to the budget as proposed and may make such changes as the board deems necessary.

SECTION 6. SEVERABILITY AND INVALID PROVISIONS. If any one of the covenants, agreements or provisions herein contained shall be held contrary to any express provision of law or contract to the policy of express law, but not expressly prohibited or against public policy, or shall for any reason whatsoever be held invalid, then such covenants, agreements or provisions shall be null and void and shall be deemed separable from the remaining covenants, agreements or provisions and shall in no way effect the validity of the other provisions hereof., That all Sections or parts of Sections of any Resolutions, Agreements or actions of the Board of Supervisors in conflict are hereby repealed to the extent of such conflict.

SECTION 7. EFFECTIVE DATE. This Resolution shall take effect immediately upon adoption.

PASSED AND ADOPTED by the Board of Supervisors of the Pioneer Ranch Community Development District, Marion County, Florida, this 16th day of April 2024.

ATTEST:

**PIONEER RANCH
COMMUNITY DEVELOPMENT DISTRICT**

James P. Ward, Secretary

Name: _____
Chairperson / Vice-Chairperson

Exhibit A: Fiscal Year 2025 Proposed Budget

Marion Ranch Community Development District
General Fund - Budget
Fiscal Year 2025

Description	FY 2025
Revenues and Other Sources	
Carryforward	\$ -
Interest Income - General Account	\$ -
Assessment Revenue	
Assessments - On-Roll	
Assessments - Off-Roll	
Contributions - Private Sources	
Lennar Homes	\$ 125,315
Total Revenue & Other Sources	\$ 125,315
Appropriations	
Legislative	
Board of Supervisor's Fees	\$ -
Board of Supervisor's - FICA	\$ -
Executive	
Professional - Management	\$ 40,000
Financial and Administrative	
Audit Services	\$ 4,500
Accounting Services	\$ 16,000
Assessment Roll Preparation	\$ 16,000
Arbitrage Rebate Fees	\$ 500
Other Contractual Services	
Recording and Transcription	\$ -
Legal Advertising	\$ 3,500
Trustee Services	\$ 5,000
Dissemination Agent Services	\$ 2,000
Property Appraiser Fees	\$ -
Bank Service Fees	\$ 350
Travel and Per Diem	
Communications and Freight Services	
Telephone	\$ -
Postage, Freight & Messenger	\$ 750
Rentals and Leases	
Miscellaneous Equipment	\$ -
Computer Services (Web Site)	\$ 1,600
Insurance	\$ 4,440
Subscriptions and Memberships	\$ 175
Printing and Binding	\$ 500
Office Supplies	\$ -

Marion Ranch Community Development District
General Fund - Budget
Fiscal Year 2025

Description	FY 2025
Legal Services	
General Counsel	\$ 15,000
Other General Government Services	
Engineering Services	\$ 15,000
Contingencies	\$ -
Capital Outlay	\$ -
Reserves	
Operational Reserve (Future Years)	\$ -
Other Fees and Charges	
Discounts, Tax Collector Fee and Property Appraiser Fee	\$ -
Total Appropriations	<u>\$ 125,315</u>

RESOLUTION 2024-27

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT DESIGNATING A DATE, TIME, AND LOCATION OF A PUBLIC HEARING REGARDING THE DISTRICT'S INTENT TO USE THE UNIFORM METHOD FOR THE LEVY, COLLECTION, AND ENFORCEMENT OF NON-AD VALOREM SPECIAL ASSESSMENTS AS AUTHORIZED BY SECTION 197.3632, *FLORIDA STATUTES*; AUTHORIZING THE PUBLICATION OF THE NOTICE OF SUCH HEARING; PROVIDING FOR SEVERABILITY, INVALID PROVISIONS, CONFLICT AND PROVIDING AN EFFECTIVE DATE.

RECITALS

WHEREAS, the Pioneer Ranch Community Development District ("**District**") is a local unit of special-purpose government creating and existing pursuant to Chapter 190, *Florida Statutes*, being situated entirely within Marion County, Florida; and

WHEREAS, the District pursuant to the provisions of Chapter 190, *Florida Statutes*, is authorized to levy, collect and enforce certain special assessments, which include benefit and maintenance assessments and further authorizes the Board of Supervisors of the District ("**Board**") to levy, collect and enforce special assessments pursuant to Chapters 170 and 190, *Florida Statutes*; and

WHEREAS, the District desires to use the Uniform Method for the levy, collection and enforcement of non-ad valorem special assessments authorized by Section 197.3632, *Florida Statutes*, ("**Uniform Method**").

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT:

SECTION 1. PUBLIC HEARING. A Public Hearing will be held to adopt the Uniform Method on July 16, 2024, at 3:30 p.m., at the Division Offices of Lennar Homes, 2100 SE 17th Street, Suite 601, Ocala, FL 34471.

SECTION 2. PROPERTY SUBJECT TO THE LEVY. The property subject to the levy of assessments of the District include all the property within the boundaries of the District, as shown on **Exhibit A**, attached hereto and made a part of this Resolution.

SECTION 3. PUBLICATION. The District Manager is hereby directed to publish notice of the hearing in accordance with Section 197.3632, *Florida Statutes*.

SECTION 4. SEVERABILITY AND INVALID PROVISIONS. If any one of the covenants, agreements or provisions herein contained shall be held contrary to any express provision of law or contract to the policy of express law, but not expressly prohibited or against public policy, or shall for any reason whatsoever be held invalid, then such covenants, agreements or provisions shall be null and void

RESOLUTION 2024-16

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE PIONEER RANCH COMMUNITY DEVELOPMENT DISTRICT DESIGNATING A DATE, TIME, AND LOCATION OF A PUBLIC HEARING REGARDING THE DISTRICT'S INTENT TO USE THE UNIFORM METHOD FOR THE LEVY, COLLECTION, AND ENFORCEMENT OF NON-AD VALOREM SPECIAL ASSESSMENTS AS AUTHORIZED BY SECTION 197.3632, *FLORIDA STATUTES*; AUTHORIZING THE PUBLICATION OF THE NOTICE OF SUCH HEARING; PROVIDING FOR SEVERABILITY, INVALID PROVISIONS, CONFLICT AND PROVIDING AN EFFECTIVE DATE.

and shall be deemed separable from the remaining covenants, agreements or provisions and shall in no way affect the validity of the other provisions hereof.

SECTION 5. CONFLICT. That all Sections or parts of Sections of any Resolutions, Agreements, or actions of the Board of Supervisors in conflict are hereby repealed to the extent of such conflict.

SECTION 6. PROVIDING FOR AN EFFECTIVE DATE. This Resolution shall become effective immediately upon passage.

PASSED AND ADOPTED by the Board of Supervisors of the Pioneer Ranch Community Development District, Marion County, Florida, this 16th day of April 2024.

ATTEST:

**PIONEER RANCH COMMUNITY
DEVELOPMENT DISTRICT**

James P. Ward, Secretary

Name: _____
Chairperson / Vice-Chairperson

Exhibit A: Legal Description of Property

**SKETCH OF DESCRIPTION FOR:
95TH STREET HOLDINGS, LLC
SECTIONS 17, 19 & 20, TOWNSHIP 16 SOUTH, RANGE 21 EAST,
MARION COUNTY, FLORIDA
"PIONEER RANCH CDD"**

DESCRIPTION:

PHASE 2:

A PARCEL OF LAND LYING IN SECTIONS 17, 19, AND 20, TOWNSHIP 16 SOUTH, RANGE 21 EAST, MARION COUNTY, FLORIDA, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

BEGIN AT THE NORTHWEST CORNER OF SAID SECTION 20; THENCE ALONG THE NORTH BOUNDARY OF SAID SECTION 20, S.89°37'37"E., 1,320.51 FEET TO THE WEST BOUNDARY OF THE S.E. 1/4 OF THE S.W. 1/4 OF SAID SECTION 17; THENCE DEPARTING SAID NORTH BOUNDARY, ALONG SAID WEST BOUNDARY, N.00°27'32"E., 664.67 FEET TO THE SOUTH BOUNDARY OF SUN COUNTRY ESTATES II AS RECORDED IN PLAT BOOK V, PAGES 90 AND 91 OF THE PUBLIC RECORDS OF MARION COUNTY, FLORIDA ; THENCE DEPARTING SAID WEST BOUNDARY, ALONG SAID SOUTH BOUNDARY, S.89°39'45"E., 1,009.33 FEET TO THE WESTERLY MOST POINT OF JB RANCH SUBDIVISION PHASE 1 AS RECORDED IN PLAT BOOK 11, PAGES 26 THROUGH 30 OF THE PUBLIC RECORDS OF MARION COUNTY, FLORIDA; THENCE DEPARTING SAID SOUTH BOUNDARY, ALONG THE WESTERLY BOUNDARY OF SAID JB RANCH SUBDIVISION PHASE 1 THE FOLLOWING TEN (10) COURSES: (1.) S.67°29'41"E., 169.56 FEET; (2.) THENCE S.62°51'10"E., 54.32 FEET; (3.) THENCE S.50°54'36"E., 45.50 FEET; (4.) THENCE S.39°27'13"E., 51.36 FEET; (5.) THENCE S.26°10'17"E., 63.00 FEET; (6.) THENCE S.09°39'17"E., 46.41 FEET; (7.) THENCE S.07°01'30"E., 102.76 FEET TO A POINT ON A NON-TANGENT CURVE CONCAVE EASTERLY, HAVING A RADIUS OF 960.00 FEET, A CENTRAL ANGLE OF 45°04'49", AND A CHORD BEARING AND DISTANCE OF S.22°42'51"W., 736.00 FEET; (8.) THENCE SOUTHWESTERLY ALONG THE ARC OF SAID CURVE AND WEST BOUNDARY, A DISTANCE OF 755.33 FEET TO THE END OF SAID CURVE; (9.) THENCE S.89°45'36"E., 125.29 FEET; (10.) THENCE S.00°07'46"W., 166.31 FEET; THENCE DEPARTING SAID WESTERLY BOUNDARY, ALONG THE PROJECTION OF THE NORTHERLY RIGHT OF WAY LINE OF S.W. 95TH STREET ROAD (RIGHT OF WAY WIDTH VARIES) N.89°56'51"W., 113.94 FEET; THENCE ALONG SAID NORTHERLY RIGHT OF WAY LINE THE FOLLOWING TEN (10) COURSES: (1.) S.00°03'09"W., 12.03 FEET TO THE BEGINNING OF A NON-TANGENT CURVE CONCAVE NORTHWESTERLY, HAVING A RADIUS OF 25.00 FEET, A CENTRAL ANGLE OF 90°00'44", AND A CHORD BEARING AND DISTANCE OF S.45°11'45"W., 35.36 FEET; (2.) THENCE SOUTHWESTERLY ALONG THE ARC OF SAID CURVE AND RIGHT OF WAY LINE, A DISTANCE OF 39.28 FEET TO THE END OF SAID CURVE; (3.) THENCE N.89°50'03"W., 1,470.43 FEET; (4.) THENCE N.76°18'11"W., 51.43 FEET; (5.) THENCE N.89°50'25"W., 207.36 FEET TO THE BEGINNING OF A NON-TANGENT CURVE CONCAVE NORTHEASTERLY, HAVING A RADIUS OF 25.00 FEET, A CENTRAL ANGLE OF 89°59'05", AND A CHORD BEARING

CONTINUE NEXT PAGE....

NOTES:

1. DATE OF SKETCH: JUNE 4, 2023.
2. SUBJECT TO RIGHTS OF WAY, RESTRICTIONS, EASEMENTS AND RESERVATIONS OF RECORD.
3. UNLESS OTHERWISE SHOWN, UNDERGROUND IMPROVEMENTS NOT LOCATED.
4. PUBLIC RECORDS NOT SEARCHED BY JCH CONSULTING GROUP, INC.
5. BEARINGS AND COORDINATES SHOWN HEREON ARE BASED ON THE FLORIDA STATE PLANE COORDINATE SYSTEM, WEST ZONE, NORTH AMERICAN DATUM OF 1983 (NAD 83), WITH 2011 ADJUSTMENT AS DERIVED FROM THE FLORIDA DEPARTMENT OF TRANSPORTATION VIRTUAL REFERENCE STATION NETWORK.
6. ADDITIONS OR DELETIONS TO SURVEY MAPS BY OTHER THAN THE SIGNING PARTY OR PARTIES IS PROHIBITED WITHOUT WRITTEN CONSENT OF THE SIGNING PARTY OR PARTIES.
7. THIS SKETCH HAS BEEN PREPARED FOR THE EXCLUSIVE BENEFIT OF THE PARTY(IES) NAMED HEREON, AND SHALL NOT BE DUPLICATED OR RELIED UPON BY ANY OTHER INDIVIDUAL OR ENTITY WITHOUT AUTHORIZATION FROM JCH CONSULTING GROUP, INC.

LEGEND:

- |— LINE BREAK
- R/W RIGHT-OF-WAY
- CONC. CONCRETE
- LS LAND SURVEYOR
- LB LICENSED BUSINESS
- NO. NUMBER
- CL CENTERLINE
- P.C. POINT OF CURVATURE
- P.I. POINT OF INTERSECTION
- L ARC LENGTH
- R RADIUS
- Δ DELTA (CENTRAL ANGLE)
- CB CHORD BEARING
- CH CHORD DISTANCE
- CHANGE IN DIRECTION

NOTE: THIS IS NOT A SURVEY

SHEET 1 OF 5
ONE IS NOT COMPLETE
WITHOUT THE OTHERS

SURVEYOR'S CERTIFICATION:

I HEREBY CERTIFY THAT THE SKETCH REPRESENTED HEREON MEETS THE STANDARDS OF PRACTICE AS SET FORTH BY THE FLORIDA BOARD OF PROFESSIONAL SURVEYORS AND MAPPERS IN CHAPTER 5J-17.050-052, FLORIDA ADMINISTRATIVE CODE, PURSUANT TO SECTION 472.027, FLORIDA STATUTES.

CHRISTOPHER J. HOWSON, P.S.M., C.F.M. - LS 6553
OF JCH CONSULTING GROUP, INC.

NOT VALID WITHOUT THE SIGNATURE AND THE ORIGINAL RAISED SEAL OF A FLORIDA LICENSED SURVEYOR AND MAPPER

Drawing name: Z:\Projects\201188 JB Ranch - Pioneer Ranch 35635-000-01, 35635-000-00, 35700-000-00\DWG\Sketch Overall CDD\201188SK (CDD).dwg SHEET 1 Jun 04, 2023 4:48pm by: chowson



JCH

CONSULTING GROUP, INC.
LAND DEVELOPMENT + SURVEYING & MAPPING
PLANNING + ENVIRONMENTAL + G.I.S.
CERTIFICATE OF AUTHORIZATION NO. LB 8071 CHRISTOPHER J. HOWSON, P.S.M., C.F.M. - LS 6553
426 SW 15TH STREET, OCALA, FLORIDA 34471
PHONE (352) 405-1482 www.JCHeg.com

DRAWN:	C.J.H.	J.O.# 201188
REVISED:		DWG.# 201188SK (CDD)
CHECKED:	C.J.H.	SHEET 1 OF 5
APPROVED:	C.J.H.	PIONEER RANCH CDD
SCALE: 1" = 1000'		COPYRIGHT © JUNE, 2023

**SKETCH OF DESCRIPTION FOR:
95TH STREET HOLDINGS, LLC
SECTIONS 17, 19 & 20, TOWNSHIP 16 SOUTH, RANGE 21 EAST,
MARION COUNTY, FLORIDA
"PIONEER RANCH CDD"**

DESCRIPTION:

CONTINUE...

AND DISTANCE OF N.44°47'50"W., 35.35 FEET; (6.) THENCE NORTHWESTERLY ALONG THE ARC OF SAID CURVE AND RIGHT OF WAY LINE, A DISTANCE OF 39.26 FEET TO THE END OF SAID CURVE; (7.) THENCE N.89°51'15"W., 89.99 FEET; (8.) THENCE S.00°11'11"W., 12.00 FEET TO THE BEGINNING OF A NON-TANGENT CURVE CONCAVE NORTHWESTERLY, HAVING A RADIUS OF 25.00 FEET, A CENTRAL ANGLE OF 89°57'02", AND A CHORD BEARING AND DISTANCE OF S.45°13'37"W., 35.34 FEET; (9.) THENCE SOUTHWESTERLY ALONG THE ARC OF SAID CURVE AND RIGHT OF WAY LINE, A DISTANCE OF 39.25 FEET TO THE END OF SAID CURVE; (10.) THENCE N.89°54'59"W., 572.32 FEET TO THE WESTERLY BOUNDARY OF LANDS DESCRIBED IN OFFICIAL RECORDS BOOK 5903, PAGE 981 OF THE PUBLIC RECORDS OF MARION COUNTY, FLORIDA; THENCE DEPARTING SAID NORTHERLY RIGHT OF WAY LINE, ALONG SAID WESTERLY BOUNDARY THE FOLLOWING TWO (2) COURSES: (1.) N.00°21'36"E., 588.75 FEET; (2.) THENCE S.89°51'01"E., 78.51 FEET TO THE POINT OF BEGINNING. SAID LANDS CONTAINING 52.32 ACRES, MORE OR LESS.

LESS AND EXCEPT THE FOLLOWING DESCRIBED LANDS (EXCEPTION PHASE 1 ENTRY)

A PARCEL OF LAND LYING IN SECTION 20, TOWNSHIP 16 SOUTH, RANGE 21 EAST, MARION COUNTY, FLORIDA, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

COMMENCE AT THE NORTHWEST CORNER OF SAID SECTION 20; THENCE ALONG THE NORTH BOUNDARY OF SAID SECTION 20, S.89°37'37"E., 1,320.51 FEET TO THE WEST BOUNDARY OF THE S.E. 1/4 OF THE S.W. 1/4 OF SAID SECTION 17; THENCE DEPARTING SAID NORTH BOUNDARY, ALONG SAID WEST BOUNDARY, N.00°27'32"E., 664.67 FEET TO THE SOUTH BOUNDARY OF SUN COUNTRY ESTATES II AS RECORDED IN PLAT BOOK V, PAGES 90 AND 91 OF THE PUBLIC RECORDS OF MARION COUNTY, FLORIDA ; THENCE DEPARTING SAID WEST BOUNDARY, ALONG SAID SOUTH BOUNDARY, S.89°39'45"E., 1,009.33 FEET TO THE WESTERLY MOST POINT OF JB RANCH SUBDIVISION PHASE 1 AS RECORDED IN PLAT BOOK 11, PAGES 26 THROUGH 30 OF THE PUBLIC RECORDS OF MARION COUNTY, FLORIDA; THENCE DEPARTING SAID SOUTH BOUNDARY, ALONG THE WESTERLY BOUNDARY OF SAID JB RANCH SUBDIVISION PHASE 1 THE FOLLOWING TEN (10) COURSES: (1.) S.67°29'41"E., 169.56 FEET; (2.) THENCE S.62°51'10"E., 54.32 FEET; (3.) THENCE S.50°54'36"E., 45.50 FEET; (4.) THENCE S.39°27'13"E., 51.36 FEET; (5.) THENCE S.26°10'17"E., 63.00 FEET; (6.) THENCE S.09°39'17"E., 46.41 FEET; (7.) THENCE S.07°01'30"E., 102.76 FEET TO A POINT ON A NON-TANGENT CURVE CONCAVE EASTERLY, HAVING A RADIUS OF 960.00 FEET, A CENTRAL ANGLE OF 45°04'49", AND A CHORD BEARING AND DISTANCE OF S.22°42'51"W., 736.00 FEET; (8.) THENCE SOUTHWESTERLY ALONG THE ARC OF SAID CURVE AND WEST BOUNDARY, A DISTANCE OF 755.33 FEET TO THE END OF SAID CURVE AND THE POINT OF BEGINNING. (9.) THENCE S.89°45'36"E., 125.29 FEET; (10.) THENCE S.00°07'46"W., 166.31 FEET; THENCE DEPARTING SAID WESTERLY BOUNDARY, ALONG THE PROJECTION OF THE NORTHERLY RIGHT OF WAY LINE OF S.W. 95TH STREET ROAD (RIGHT OF WAY WIDTH VARIES) N.89°56'51"W., 113.94 FEET; THENCE N.03°45'56"W., 167.09 FEET TO THE POINT OF BEGINNING. SAID LANDS CONTAINING 0.46 ACRES, MORE OR LESS.

AND

PHASE 3:

A PARCEL OF LAND LYING IN SECTIONS 19 AND 20, TOWNSHIP 16 SOUTH, RANGE 21 EAST, MARION COUNTY, FLORIDA, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

COMMENCING AT THE WEST 1/4 CORNER OF SAID SECTION 20; THENCE ALONG THE WEST BOUNDARY OF THE NORTHWEST 1/4 OF SAID SECTION 20, N.00°25'28"E., 1351.15 FEET TO A POINT 25.00 FEET NORTH OF THE SOUTH BOUNDARY OF THE NORTH 1/2 OF THE NORTHEAST 1/4 OF SAID SECTION 19, THENCE ALONG A LINE 25 NORTH OF AND PARALLEL WITH SAID SOUTH BOUNDARY N.89°39'02"W., 3335.54 FEET; THENCE DEPARTING SAID PARALLEL LINE, N.41°47'08"E., 967.88 FEET TO A POINT ON THE SOUTHERLY RIGHT OF WAY LINE OF S.W. 95TH STREET ROAD (RIGHT OF WAY WIDTH VARIES), BEING THE BEGINNING OF A NON-TANGENT CURVE CONCAVE NORTHERLY, HAVING A RADIUS OF 960.00 FEET, A CENTRAL ANGLE OF 31°41'01", AND A CHORD BEARING AND DISTANCE OF S.74°01'03"E., 524.13 FEET; THENCE ALONG THE SOUTHERLY AND WESTERLY RIGHT OF WAY LINE OF SAID S.W. 95TH STREET ROAD THE FOLLOWING (22) TWENTY-TWO COURSES: (1.) THENCE SOUTHEASTERLY ALONG THE ARC OF SAID CURVE AND RIGHT OF WAY LINE, A DISTANCE OF 530.87 FEET TO THE END OF SAID CURVE; (2.) THENCE S.89°49'29"E., 611.65 FEET TO THE BEGINNING OF A NON-TANGENT CURVE CONCAVE SOUTHWESTERLY, HAVING A RADIUS OF 25.00 FEET, A CENTRAL ANGLE OF 89°57'35", AND A CHORD BEARING AND DISTANCE OF S.44°55'27"E., 35.34 FEET; (3.) THENCE SOUTHEASTERLY ALONG THE ARC OF SAID CURVE AND RIGHT OF WAY LINE, A DISTANCE OF 39.25 FEET TO THE END

CONTINUE NEXT PAGE...

****NOTE: THIS IS NOT A SURVEY****

SHEET 2 OF 5

ONE IS NOT COMPLETE
WITHOUT THE OTHERS

Drawing name: Z:\Projects\201188 JB Ranch - Pioneer Ranch 35635-000-01, 35635-000-00, 35700-000-00\DWG\Sketch Overall CDD\201188SK (CDD).dwg SHEET 2 Jun 04, 2023 4:48pm by: chowson



JCH

CONSULTING GROUP, INC.
LAND DEVELOPMENT + SURVEYING & MAPPING
PLANNING + ENVIRONMENTAL + G.I.S.
CERTIFICATE OF AUTHORIZATION NO. LB 8071 CHRISTOPHER J. HOWSON, P.S.M., C.F.M. - LS 6553
426 SW 15TH STREET, OCALA, FLORIDA 34471
PHONE (352) 405-1482 www.JCHeg.com

DRAWN:	C.J.H.	J.O.# 201188
REVISED:		DWG.# 201188SK (CDD)
CHECKED:	C.J.H.	SHEET 2 OF 5
APPROVED:	C.J.H.	PIONEER RANCH CDD
SCALE: 1" = 1000'		COPYRIGHT © JUNE, 2023

**SKETCH OF DESCRIPTION FOR:
95TH STREET HOLDINGS, LLC
SECTIONS 17, 19 & 20, TOWNSHIP 16 SOUTH, RANGE 21 EAST,
MARION COUNTY, FLORIDA
"PIONEER RANCH CDD"**

DESCRIPTION:

CONTINUE...

OF SAID CURVE; (4.) THENCE S.89°53'33"E., 79.93 FEET TO THE BEGINNING OF A NON-TANGENT CURVE CONCAVE SOUTHEASTERLY, HAVING A RADIUS OF 25.00 FEET, A CENTRAL ANGLE OF 89°59'48", AND A CHORD BEARING AND DISTANCE OF N.45°08'16"E., 35.35 FEET; (5.) THENCE NORTHEASTERLY ALONG THE ARC OF SAID CURVE AND RIGHT OF WAY LINE, A DISTANCE OF 39.27 FEET TO THE END OF SAID CURVE; (6.) THENCE S.89°49'56"E., 1,696.89 FEET; (7.) THENCE S.76°22'21"E., 51.36 FEET; (8.) THENCE S.89°48'54"E., 207.41 FEET TO THE BEGINNING OF A NON-TANGENT CURVE CONCAVE SOUTHWESTERLY, HAVING A RADIUS OF 25.00 FEET, A CENTRAL ANGLE OF 87°40'34", AND A CHORD BEARING AND DISTANCE OF S.44°23'00"E., 34.63 FEET; (9.) THENCE SOUTHEASTERLY ALONG THE ARC OF SAID CURVE AND RIGHT OF WAY LINE, A DISTANCE OF 38.26 FEET TO THE END OF SAID CURVE; (10.) THENCE S.89°40'18"E., 90.76 FEET; (11.) THENCE N.00°00'35"E., 11.94 FEET TO THE BEGINNING OF A NON-TANGENT CURVE CONCAVE SOUTHEASTERLY, HAVING A RADIUS OF 25.00 FEET, A CENTRAL ANGLE OF 90°16'48", AND A CHORD BEARING AND DISTANCE OF N.44°55'45"E., 35.44 FEET; (12.) THENCE NORTHEASTERLY ALONG THE ARC OF SAID CURVE AND RIGHT OF WAY LINE, A DISTANCE OF 39.39 FEET TO THE END OF SAID CURVE; (13.) THENCE S.89°49'56"E., 1,466.80 FEET; (14.) THENCE S.76°22'39"E., 51.41 FEET; (15.) THENCE S.89°48'06"E., 200.94 FEET TO THE BEGINNING OF A NON-TANGENT CURVE CONCAVE SOUTHWESTERLY, HAVING A RADIUS OF 25.00 FEET, A CENTRAL ANGLE OF 89°57'07", AND A CHORD BEARING AND DISTANCE OF S.44°53'53"E., 35.34 FEET; (16.) THENCE SOUTHEASTERLY ALONG THE ARC OF SAID CURVE AND RIGHT OF WAY LINE, A DISTANCE OF 39.25 FEET TO THE END OF SAID CURVE; (17.) THENCE S.89°49'16"E., 99.99 FEET; (18.) THENCE N.00°08'16"E., 12.06 FEET TO THE BEGINNING OF A NON-TANGENT CURVE CONCAVE SOUTHEASTERLY, HAVING A RADIUS OF 25.00 FEET, A CENTRAL ANGLE OF 90°02'07", AND A CHORD BEARING AND DISTANCE OF N.45°07'39"E., 35.37 FEET; (19.) THENCE NORTHEASTERLY ALONG THE ARC OF SAID CURVE AND RIGHT OF WAY LINE, A DISTANCE OF 39.29 FEET TO THE END OF SAID CURVE; (20.) THENCE S.89°50'05"E., 191.13 FEET TO A POINT OF CURVATURE OF A CURVE CONCAVE SOUTHWESTERLY, HAVING A RADIUS OF 840.00 FEET, A CENTRAL ANGLE OF 67°00'09", AND A CHORD BEARING AND DISTANCE OF S.56°20'14"E., 927.29 FEET; (21.) THENCE SOUTHEASTERLY ALONG THE ARC OF SAID CURVE AND RIGHT OF WAY LINE, A DISTANCE OF 982.31 FEET TO A POINT OF TANGENCY; (22.) THENCE S.22°43'13"E., 115.41 FEET; THENCE DEPARTING SAID SOUTHERLY AND WESTERLY RIGHT OF WAY LINE, ALONG THE NORTH BOUNDARY OF THE SOUTHWEST 1/4 OF THE NORTHEAST 1/4 OF SAID SECTION 20, S.89°59'20"W., 882.35 FEET TO THE NORTHEAST CORNER OF THE SOUTH 1/2 OF THE NORTHWEST 1/4 OF SAID SECTION 20; THENCE ALONG THE NORTH BOUNDARY OF THE SOUTH 1/2 OF THE NORTHWEST 1/4 OF SAID SECTION 20, S.89°54'12"W., 164.74 FEET TO THE BEGINNING OF A NON-TANGENT CURVE CONCAVE NORTHWESTERLY, HAVING A RADIUS OF 1,030.00 FEET, A CENTRAL ANGLE OF 29°13'26", AND A CHORD BEARING AND DISTANCE OF S.31°05'37"W., 519.68 FEET; THENCE SOUTHWESTERLY ALONG THE ARC OF SAID CURVE, A DISTANCE OF 525.35 FEET TO THE END OF SAID CURVE; THENCE S.00°22'01"W., 847.86 FEET TO THE SOUTHERLY BOUNDARY OF LANDS AS DESCRIBED IN OFFICIAL RECORDS BOOK 5903, PAGE 981 OF THE PUBLIC RECORDS OF MARION COUNTY, FLORIDA; THENCE ALONG SAID SOUTHERLY BOUNDARY, N.89°53'46"W., 2,188.20 FEET TO THE SOUTHWESTERLY CORNER OF SAID LANDS; THENCE DEPARTING SAID SOUTHERLY BOUNDARY, ALONG THE WESTERLY BOUNDARY OF SAID LANDS AS DESCRIBED IN OFFICIAL RECORDS BOOK 5903, PAGE 981, N.00°25'40"E., 1,325.98; THENCE DEPARTING SAID WESTERLY BOUNDARY N.89.34'43"W., 25.16 FEET TO THE POINT OF BEGINNING.

LESS AND EXCEPT THE FOLLOWING DESCRIBED LANDS: (EXCEPTION PHASE 3 LIFT STATION)

LESS AND EXCEPT LIFT STATION SITE DEEDED TO MARION COUNTY IN OFFICIAL RECORDS BOOK 5054, PAGE 1720 OF THE PUBLIC RECORDS OF MARION COUNTY, FLORIDA.

AND

PARCEL 1:

THE SOUTH 529.21 FEET OF THE SW 1/4 OF THE SW 1/4 OF SECTION 17, TOWNSHIP 16 SOUTH, RANGE 21 EAST, MARION COUNTY, FLORIDA. TOGETHER WITH A NON-EXCLUSIVE EASEMENT FOR PURPOSE OF INGRESS AND EGRESS OVER THE WEST 40 FEET OF THE SOUTHWEST 1/4 OF THE SOUTHWEST 1/4 AND THE SOUTH 1/2 OF THE NORTHWEST 1/4 OF THE SOUTHWEST 1/4 OF SECTION 17, TOWNSHIP 16 SOUTH, RANGE 21 EAST, MARION COUNTY, FLORIDA.

PARCEL 2:

THE SOUTHWEST 1/4 OF THE SOUTHWEST 1/4 AND THE SOUTH 1/2 OF THE NORTHWEST 1/4 OF THE SOUTHWEST 1/4 OF SECTION 17, TOWNSHIP 16 SOUTH, RANGE 21 EAST, MARION COUNTY, FLORIDA. EXCEPT THE SOUTH 529.21 FEET OF THE SOUTHWEST 1/4 OF THE SOUTHWEST 1/4 OF SAID SECTION 17.

****NOTE: THIS IS NOT A SURVEY****

SHEET 3 OF 5

ONE IS NOT COMPLETE
WITHOUT THE OTHERS

Drawing name: Z:\Projects\201188 JB Ranch - Pioneer Ranch 35635-000-01, 35635-000-00, 35700-000-00\DWG\Sketch Overall CDD\201188SK (CDD).dwg SHEET 3 Jun 04, 2023 4:49pm by: chowson

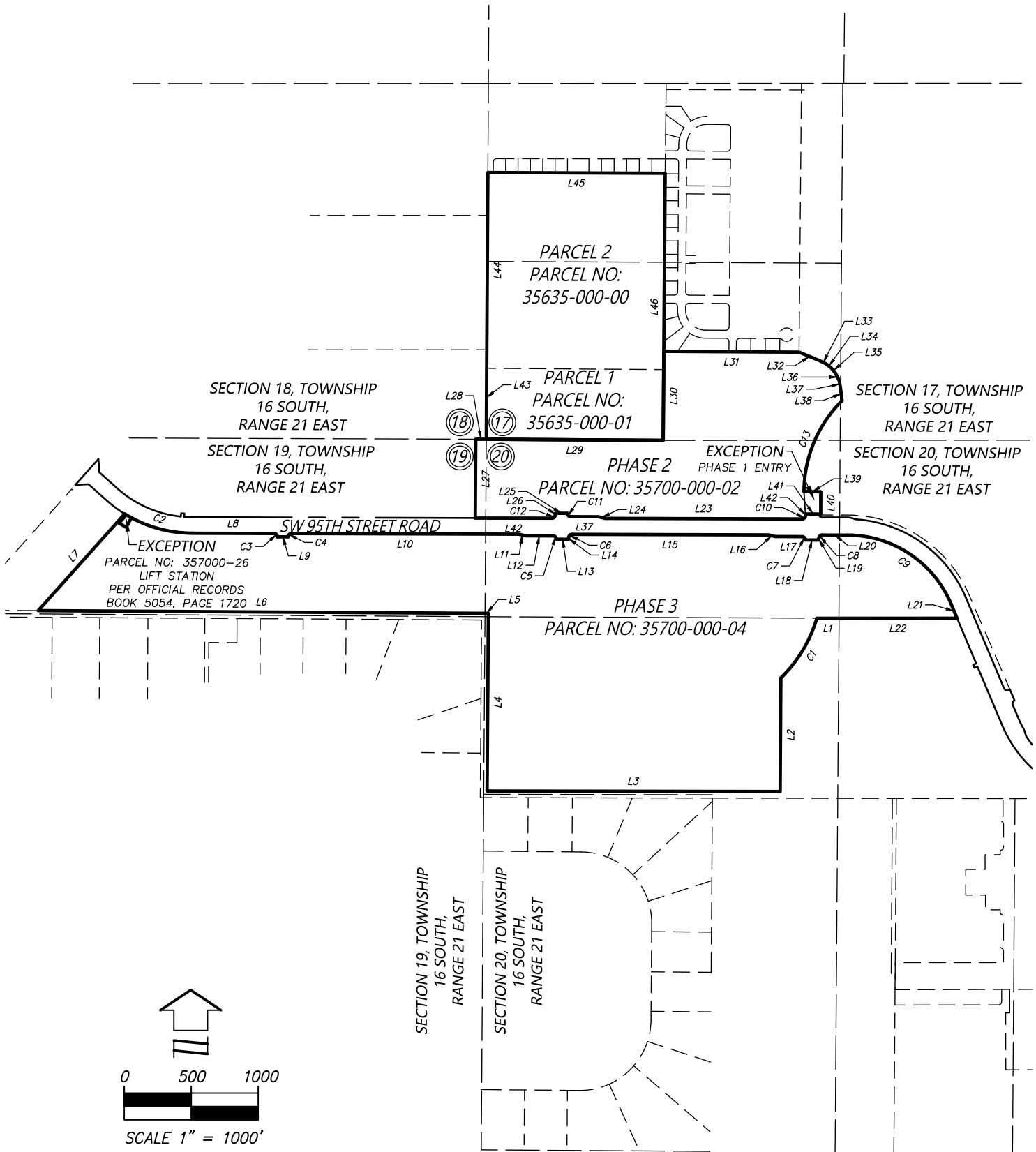


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LAND DEVELOPMENT + SURVEYING & MAPPING
PLANNING + ENVIRONMENTAL + G.I.S.
CERTIFICATE OF AUTHORIZATION NO. LB 8071 CHRISTOPHER J. HOWSON, P.S.M., C.F.M. - LS 6553
426 SW 15TH STREET, OCALA, FLORIDA 34471
PHONE (352) 405-1482 www.JCHeg.com

DRAWN:	C.J.H.	J.O.# 201188
REVISED:		DWG.# 201188SK (CDD)
CHECKED:	C.J.H.	SHEET 3 OF 5
APPROVED:	C.J.H.	PIONEER RANCH CDD
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**SKETCH OF DESCRIPTION FOR:
95TH STREET HOLDINGS, LLC
SECTIONS 17, 19 & 20, TOWNSHIP 16 SOUTH, RANGE 21 EAST,
MARION COUNTY, FLORIDA
"PIONEER RANCH CDD"**



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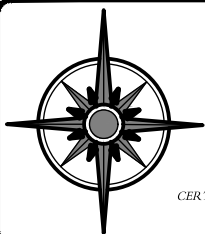
LINE TABLE		
LINE	BEARING	LENGTH
L1	S89°54'12"W	164.74
L2	S0°22'01"W	847.86
L3	N89°53'46"W	2188.20
L4	N0°25'40"E	1325.98
L5	N89°34'43"W	25.16
L6	N89°39'02"W	3335.54
L7	N41°47'08"E	967.88
L8	S89°49'29"E	611.65
L9	S89°53'33"E	79.93
L10	S89°49'56"E	1696.89
L11	S76°22'21"E	51.36
L12	S89°48'54"E	207.41
L13	S89°40'18"E	90.76
L14	N0°00'35"E	11.94
L15	S89°49'56"E	1466.80
L16	S76°22'39"E	51.41
L17	S89°48'06"E	200.94

LINE TABLE		
LINE	BEARING	LENGTH
L18	S89°49'16"E	99.99
L19	N0°08'16"E	12.06
L20	S89°50'05"E	191.13
L21	S22°43'13"E	115.41
L22	S89°59'20"W	882.35
L23	N89°50'03"W	1470.43
L24	N76°18'11"W	51.43
L25	N89°51'15"W	89.99
L26	S0°11'11"W	12.00
L27	N0°21'36"E	588.75
L28	S89°51'01"E	78.51
L29	N89°37'37"W	1320.51
L30	N0°27'32"E	664.67
L31	S89°39'45"E	1009.33
L32	S67°29'41"E	169.56
L33	S62°51'10"E	54.32
L34	S50°54'36"E	45.50

LINE TABLE		
LINE	BEARING	LENGTH
L35	S39°27'13"E	51.36
L36	S26°10'17"E	63.00
L37	N89°50'25"W	207.36
L37	S9°39'17"E	46.41
L38	S7°01'30"E	102.76
L39	S89°45'36"E	125.29
L40	S0°07'46"W	166.31
L41	N89°56'51"W	113.94
L42	S0°03'09"W	12.03
L42	N89°54'59"W	572.32
L43	N0°21'06"E	529.34
L44	N0°20'31"E	1461.66
L45	S89°44'27"E	1323.41
L46	S0°25'39"W	1993.64

CURVE TABLE					
CURVE	LENGTH	RADIUS	DELTA	CHORD	BEARING
C1	525.35	1030.00	029°13'26"	519.68	S31°05'37"W
C2	530.87	960.00	031°41'01"	524.13	S74°01'03"E
C3	39.25	25.00	089°57'35"	35.34	S44°55'27"E
C4	39.27	25.00	089°59'48"	35.35	N45°08'16"E
C5	38.26	25.00	087°40'34"	34.63	S44°23'00"E
C6	39.39	25.00	090°16'48"	35.44	N44°55'45"E
C7	39.25	25.00	089°57'07"	35.34	S44°53'53"E
C8	39.29	25.00	090°02'07"	35.37	N45°07'39"E
C9	982.31	840.00	067°00'09"	927.29	S56°20'14"E
C10	39.28	25.00	090°00'44"	35.36	S45°11'45"W
C11	39.26	25.00	089°59'05"	35.35	N44°47'50"W
C12	39.25	25.00	089°57'02"	35.34	S45°13'37"W
C13	755.33	960.00	045°04'49"	736.00	S22°42'51"W

NOTE: THIS IS NOT A SURVEY
SHEET 5 OF 5
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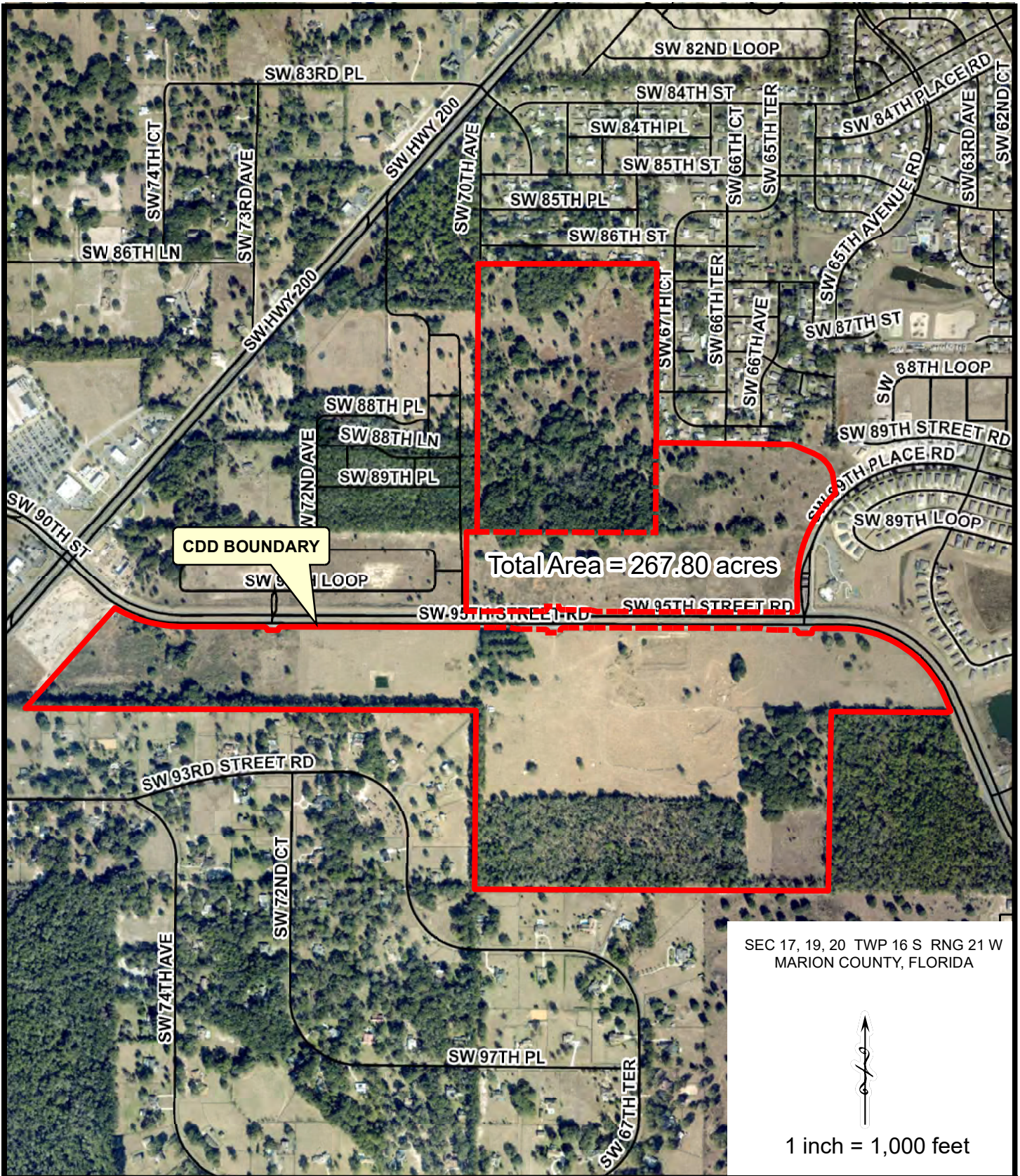


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Tillman & Associates
ENGINEERING, LLC.

Pioneer Ranch CDD
Marion County
Aerial Location
Map

DATE	7/13/2023
DRAWN BY	SH
CHKD. BY	RS
JOB NO.	21-7067
SHT.	1 OF 1

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2024 Legislature

1
 2 An act relating to special districts; repealing s.
 3 163.3756, F.S., relating to inactive community
 4 redevelopment agencies; amending s. 163.504, F.S.;
 5 prohibiting the creation of new neighborhood
 6 improvement districts after a date certain; repealing
 7 s. 165.0615 F.S., relating to municipal conversion of
 8 independent special districts upon elector-initiated
 9 and approved referendum; creating s. 189.0312, F.S.;
 10 providing term limits for members of governing bodies
 11 of independent special districts elected by the
 12 qualified electors of the district; providing an
 13 exception; providing construction; creating s.
 14 189.0313, F.S.; providing the method for changing
 15 boundaries of an independent special district;
 16 providing an exception; amending s. 189.062, F.S.;
 17 providing additional criteria for declaring a special
 18 district inactive; requiring certain special districts
 19 to provide notice of a proposed declaration of
 20 inactive status in the county or municipality under
 21 certain circumstances; revising the time period for
 22 filing an objection to a proposed declaration;
 23 authorizing a specific objection; providing that a
 24 district declared inactive may only expend funds as
 25 necessary to service outstanding debt and to comply

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26 with existing bond covenants and contractual
 27 obligations; creating s. 189.0694, F.S.; requiring
 28 special districts to establish performance measures to
 29 assess performance; requiring special districts to
 30 publish an annual report concerning performance
 31 measures; amending s. 189.0695, F.S.; requiring the
 32 Office of Program Policy Analysis and Governmental
 33 Accountability to conduct performance reviews;
 34 repealing s. 190.047, F.S., relating to incorporation
 35 or annexation of a district; amending s. 191.013,
 36 F.S.; requiring independent special fire control
 37 districts to annually report training and
 38 certification information regarding volunteer
 39 firefighters to the Division of State Fire Marshal;
 40 amending s. 388.211, F.S.; providing the boundaries of
 41 a mosquito control district may only be changed by
 42 special act; amending s. 388.221, F.S.; reducing the
 43 maximum millage rate for mosquito control districts;
 44 providing an exception; amending s. 388.271, F.S.;
 45 requiring, instead of authorizing, special districts
 46 to file tentative work plans and work plan budgets at
 47 specified intervals; requiring the Department of
 48 Agriculture and Consumer Services to report to the
 49 Department of Commerce if certain special districts
 50 fail to submit specified information; providing an

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51 effective date.

52

53 Be It Enacted by the Legislature of the State of Florida:

54

55 Section 1. Section 163.3756, Florida Statutes, is
 56 repealed.

57 Section 2. Section 163.504, Florida Statutes, is amended
 58 to read:

59 163.504 Safe neighborhood improvement districts; formation
 60 authorized by ordinance; jurisdictional boundaries; prohibition
 61 on future creation.—

62 (1) The governing body of any municipality or county may
 63 authorize the formation of safe neighborhood improvement
 64 districts through the adoption of a planning ordinance which
 65 specifies that such districts may be created by one or more of
 66 the methods established in ss. 163.506, 163.508, 163.511, and
 67 163.512. No district may overlap the jurisdictional boundaries
 68 of a municipality and the unincorporated area of a county,
 69 except by interlocal agreement.

70 (2) A safe neighborhood improvement district may not be
 71 created on or after July 1, 2024. A safe neighborhood
 72 improvement district in existence before July 1, 2024, may
 73 continue to operate as provided in this part.

74 Section 3. Section 165.0615, Florida Statutes, is
 75 repealed.

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76 Section 4. Section 189.0312, Florida Statutes, is created
77 to read:

78 189.0312 Independent special districts; term of office.-

79 (1) A member elected by the qualified electors of the
80 district to the governing body of an independent special
81 district may not serve for more than 12 consecutive years,
82 unless the district's charter provides for more restrictive
83 terms of office. Service of a term of office that commenced
84 before November 5, 2024, does not count toward the limitation
85 imposed by this subsection.

86 (2) This section does not apply to a community development
87 district established under chapter 190, or an independent
88 special district created pursuant to a special act that provides
89 that any amendment to chapter 190 to grant additional powers
90 constitutes a power of the district.

91 (3) This section does not require an independent special
92 district governed by an appointed governing body to convert to
93 an elected governing body.

94 Section 5. Section 189.0313, Florida Statutes, is created
95 to read:

96 189.0313 Independent special districts; boundaries;
97 exception.-Notwithstanding any special law or general law of
98 local application to the contrary, the boundaries of an
99 independent special district shall only be changed by general
100 law or special act. This section does not apply to a community

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101 development district established pursuant to chapter 190.
 102 Section 6. Subsections (1) and (2) of section 189.062,
 103 Florida Statutes, are amended to read:
 104 189.062 Special procedures for inactive districts.—
 105 (1) The department shall declare inactive any special
 106 district in this state by documenting that:
 107 (a) The special district meets one of the following
 108 criteria:
 109 1. The registered agent of the district, the chair of the
 110 governing body of the district, or the governing body of the
 111 appropriate local general-purpose government notifies the
 112 department in writing that the district has taken no action for
 113 2 or more years;
 114 2. The registered agent of the district, the chair of the
 115 governing body of the district, or the governing body of the
 116 appropriate local general-purpose government notifies the
 117 department in writing that the district has not had a governing
 118 body or a sufficient number of governing body members to
 119 constitute a quorum for 2 or more years;
 120 3. The registered agent of the district, the chair of the
 121 governing body of the district, or the governing body of the
 122 appropriate local general-purpose government fails to respond to
 123 an inquiry by the department within 21 days;
 124 4. The department determines, pursuant to s. 189.067, that
 125 the district has failed to file any of the reports listed in s.

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126 | 189.066;

127 | 5. The district has not had a registered office and agent
128 | on file with the department for 1 or more years; ~~or~~

129 | 6. The governing body of a special district provides
130 | documentation to the department that it has unanimously adopted
131 | a resolution declaring the special district inactive. The
132 | special district is responsible for payment of any expenses
133 | associated with its dissolution;;

134 | 7. The district is an independent special district or a
135 | community redevelopment district created under part III of
136 | chapter 163 that has reported no revenue, no expenditures, and
137 | no debt under s. 189.016(9) or s. 218.32 for at least 5
138 | consecutive fiscal years beginning no earlier than October 1,
139 | 2018. This subparagraph does not apply to a community
140 | development district established under chapter 190 or to any
141 | independent special district operating pursuant to a special act
142 | that provides that any amendment to chapter 190 to grant
143 | additional powers constitutes a power of that district; or

144 | 8. For a mosquito control district created pursuant to
145 | chapter 388, the department has received notice from the
146 | Department of Agriculture and Consumer Services that the
147 | district has failed to file a tentative work plan and tentative
148 | detailed work plan budget as required by s. 388.271.

149 | (b) The department, special district, or local general-
150 | purpose government has published a notice of proposed

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151 | declaration of inactive status in a newspaper of general
 152 | circulation in the county or municipality in which the territory
 153 | of the special district is located and has sent a copy of such
 154 | notice by certified mail to the registered agent or chair of the
 155 | governing body, if any. If the special district is a dependent
 156 | special district with a governing body that is not identical to
 157 | the governing body of a single county or a single municipality,
 158 | a copy of such notice must also be sent by certified mail to the
 159 | governing body of the county or municipality on which the
 160 | district is dependent. Such notice must include the name of the
 161 | special district, the law under which it was organized and
 162 | operating, a general description of the territory included in
 163 | the special district, and a statement that any objections must
 164 | be filed pursuant to chapter 120 within 30 ~~21~~ days after the
 165 | publication date. The objections may include that the special
 166 | district has outstanding debt obligations that are not included
 167 | in reports required under s. 189.016(9) or s. 218.32.

168 | (c) Thirty ~~Twenty-one~~ days have elapsed from the
 169 | publication date of the notice of proposed declaration of
 170 | inactive status and no administrative appeals were filed.

171 | (2) If any special district is declared inactive pursuant
 172 | to this section, the district may only expend funds as necessary
 173 | to service outstanding debt and to comply with existing bond
 174 | covenants and other contractual obligations. The property or
 175 | assets of the special district are subject to legal process for

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176 payment of any debts of the district. After the payment of all
 177 the debts of said inactive special district, the remainder of
 178 its property or assets shall escheat to the county or
 179 municipality wherein located. If, however, it shall be
 180 necessary, in order to pay any such debt, to levy any tax or
 181 taxes on the property in the territory or limits of the inactive
 182 special district, the same may be assessed and levied by order
 183 of the local general-purpose government wherein the same is
 184 situated and shall be assessed by the county property appraiser
 185 and collected by the county tax collector.

186 Section 7. Section 189.0694, Florida Statutes, is created
 187 to read:

188 189.0694 Special districts; performance measures and
 189 standards.-

190 (1) Beginning October 1, 2024, or by the end of the first
 191 full fiscal year after its creation, whichever is later, each
 192 special district must establish goals and objectives for each
 193 program and activity undertaken by the district, as well as
 194 performance measures and standards to determine if the
 195 district's goals and objectives are being achieved.

196 (2) By December 1 of each year thereafter, each special
 197 district must publish an annual report on the district's website
 198 describing:

199 (a) The goals and objectives achieved by the district, as
 200 well as the performance measures and standards used by the

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201 district to make this determination.

202 (b) Any goals or objectives the district failed to
 203 achieve.

204 Section 8. Paragraph (c) is added to subsection (3) of
 205 section 189.0695, Florida Statutes, to read:

206 189.0695 Independent special districts; performance
 207 reviews.—

208 (3) The Office of Program Policy Analysis and Government
 209 Accountability must conduct a performance review of all
 210 independent special districts within the classifications
 211 described in paragraphs (a), ~~and~~ (b), and (c) and may contract
 212 as needed to complete the requirements of this subsection. The
 213 Office of Program Policy Analysis and Government Accountability
 214 shall submit the final report of the performance review to the
 215 President of the Senate and the Speaker of the House of
 216 Representatives as follows:

217 (c) For all safe neighborhood improvement districts as
 218 defined in s. 163.503(1), no later than September 30, 2025.

219 Section 9. Section 190.047, Florida Statutes, is repealed.

220 Section 10. Subsection (3) is added to section 191.013,
 221 Florida Statutes, to read:

222 191.013 Intergovernmental coordination.—

223 (3) By October 1 of each year, each independent special
 224 fire control district shall report to the Division of State Fire
 225 Marshal regarding whether each of the district's volunteer

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226 firefighters has completed the required trainings and received
 227 the required certifications established by the division pursuant
 228 to s. 633.408.

229 Section 11. Section 388.211, Florida Statutes, is amended
 230 to read:

231 388.211 Change in district boundaries.—

232 ~~(1) The boundaries of each district may only be changed by~~
 233 ~~a special act of the Legislature The board of commissioners of~~
 234 ~~any district formed prior to July 1, 1980, may, for and on~~
 235 ~~behalf of the district or the qualified electors within or~~
 236 ~~without the district, request that the board of county~~
 237 ~~commissioners in each county having land within the district~~
 238 ~~approve a change in the boundaries of the district.~~

239 ~~(2) If the board of county commissioners approves such~~
 240 ~~change, an amendment shall be made to the order creating the~~
 241 ~~district to conform with the boundary change.~~

242 Section 12. Subsection (1) of section 388.221, Florida
 243 Statutes, is amended to read:

244 388.221 Tax levy.—

245 (1) The board of commissioners of such district may levy
 246 upon all of the real and personal taxable property in said
 247 district a special tax not exceeding 1 mill ~~10 mills~~ on the
 248 dollar during each year as maintenance tax to be used solely for
 249 the purposes authorized and prescribed by this chapter. The
 250 board of commissioners of a district may increase such special

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251 tax to no more than 2 mills on the dollar if the increase is
252 approved by a referendum of the qualified electors of the
253 district held at a general election. Said board shall by
254 resolution certify to the property appraiser of the county in
255 which the property is situate, timely for the preparation of the
256 tax roll, the tax rate to be applied in determining the amount
257 of the district's annual maintenance tax. Certified copies of
258 such resolution executed in the name of said board by its chair
259 and secretary and under its corporate seal shall be made and
260 delivered to the property appraiser and the board of county
261 commissioners of the county in which such district is located,
262 and to the Department of Revenue not later than September 30 of
263 such year. The property appraiser of said county shall assess
264 and the tax collector of said county shall collect the amount of
265 taxes so assessed and levied by said board of commissioners of
266 said district upon all of the taxable real and personal property
267 in said district at the rate of taxation adopted by said board
268 for said year and included in said resolution, and said levy
269 shall be included in the warrants of the property appraiser and
270 attached to the assessment roll of taxes for said county each
271 year. The tax collector shall collect such taxes so levied by
272 said board in the same manner as other taxes are collected and
273 shall pay the same within the time and in the manner prescribed
274 by law to the treasurer of said board. The Department of Revenue
275 shall assess and levy on all the railroad lines and railroad

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276 property and telegraph and telephone lines and telegraph and
 277 telephone property situated in said district in the amount of
 278 each such levy as in case of other state and county taxes and
 279 shall collect said taxes thereon in the same manner as it is
 280 required by law to assess and collect taxes for state and county
 281 purposes and remit the same to the treasurer of said board. All
 282 such taxes shall be held by said treasurer for the credit of
 283 said board and paid out by him or her as ordered by said board.

284 Section 13. Subsection (1) of section 388.271, Florida
 285 Statutes, is amended, and subsection (3) is added to that
 286 section, to read:

287 388.271 Prerequisites to participation.—

288 (1) When state funds are involved, it is the duty of the
 289 department to guide, review, approve, and coordinate the
 290 activities of all county governments and special districts
 291 receiving state funds in furtherance of the goal of integrated
 292 arthropod control. Each county ~~or district~~ eligible to
 293 participate ~~hereunder~~ may, and each district must, begin
 294 participation on October 1 of any year by filing with the
 295 department not later than July 15 a tentative work plan and
 296 tentative detailed work plan budget providing for the control of
 297 arthropods. Following approval of the plan and budget by the
 298 department, two copies of the county's or district's certified
 299 budget based on the approved work plan and detailed work plan
 300 budget shall be submitted to the department by September 30

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301 following. State funds, supplies, and services shall be made
302 available to such county or district by and through the
303 department immediately upon release of funds by the Executive
304 Office of the Governor.

305 (3) If a special district fails to submit a tentative work
306 plan and tentative detailed work plan budget as required by
307 subsection (1), the department shall send notice of such failure
308 to the Department of Commerce within 30 days.

309 Section 14. This act shall take effect July 1, 2024.

MEMO

To: Board of Supervisors

From: James P. Ward

Date: March 13, 2024

Re: Commission on Ethics newly established Electronic Financial Disclosure Management System ("EFDMS") website registration, Financial Disclosure Forms, and Required Ethics Training

Beginning January 1, 2024, the Florida Commission on Ethics has enacted new procedures for electronic filing of Financial Disclosure forms for Public Officials, as a means of submitting Forms and updating your Filer contact information.

To access the newly established Electronic Financial Disclosure Management System ("EFDMS"), visit the login page (<https://disclosure.floridaethics.gov/Account/Login>) and watch the instructional video for directions on how to register/confirm registration.

If you have filed a Form 1 before, click "I am a Filer" and follow the prompts.

Instructions, FAQs, and tutorials are available from the dashboard within EFDMS. Additional assistance can be obtained Monday-Friday from 8:00 a.m. until 5:00 p.m. by contacting the Commission directly.

Financial disclosure forms are due on or before July 1, 2024 for the preceding calendar year. A grace period is in effect until September 1. If the disclosure is not filed or postmarked by September 1, an automatic fine of \$25 per day will begin to accrue and will continue to build until the disclosure is filed, or the fine reaches \$1,500.

If you have an annual filing requirement AND will be running for office as a qualified elector in November, then you will need to complete your disclosure in EFDMS and submit your filing electronically to the Commission, then print a verification/receipt for e-filing your form or print a copy of your disclosure to file with your Qualifying Officer packet.

It is imperative that each filer take the time to confirm their registration on the EFDMS site, in order to ensure that the Florida Commission on Ethics has updated and correct contact information. All communication about filing requirements and due dates for filers will be provided via email only. Filers MUST maintain a current email address in EFDMS. By law, failure to maintain a current email address will not qualify as an "unusual circumstance" during an appeal of an automatic fine for failure to timely file a Form.

If the annual form is not submitted via the electronic filing system created and maintained by the Florida Commission on Ethics by September 3, 2024, an automatic fine of \$25 for each day late will be imposed, up to a maximum penalty of \$1,500. Failure to file also can result in removal from public office [s. 112.3145, F.S.].

In addition, failure to make any required disclosure constitutes grounds for and may be punished by one or more of the following: disqualification from being on the ballot, impeachment, removal or suspension from office, or a civil penalty not exceeding \$10,000. [s. 112.317, F.S.].

Also beginning January 1, 2024, all elected local officers of independent special districts, including any person appointed to fill a vacancy on an elected special district board, whose service began on or before March 31st of the year for which you are filing, are now required to complete four (4) hours of Ethics Training each calendar year. The four (4) hours of Ethics Training shall be allocated amongst the following categories:

- two (2) hours of ethics law,
- one (1) hour of Sunshine Law; and
- one (1) hour of Public Records law.

Please note that the four (4) hours of the Ethics Training do not have to be completed all at once. Supervisors will report their 2024 training when they fill out their Form 1 (Statement of Financial Interests) for the 2025 year by checking a box confirming that they have completed the annual Ethics Training.

It is highly recommended that you keep a record of all ethics training used to satisfy the Ethics Training requirements. At present, there is no need to submit a certificate or letter of completion of the Ethics Training. However, the Florida Commission on Ethics (“COE”) advises that Supervisors maintain a record in the event they are asked to provide proof of completion of all Ethics Training.

Additionally, you may be solicited by a private organization (Florida Association of Special Districts) – to take their Ethics Training Course on their platform for which there is a fee. **You are NOT required to use their services nor pay the fees they charge.** There are several free online resources and links to resources that Supervisors might find helpful, including free training for the two (2) hour ethics portion and links to outside trainings which can be used to satisfy the other categories of the Ethics Training. **You may take training from any source you choose.**

State Ethics Laws for Constitutional Officers & Elected Municipal Officers (Video Tutorial):

<https://youtu.be/U8JktIMKzyl>

Office of the Attorney General offers training on Sunshine Law and Public Records Law (22-page presentation):

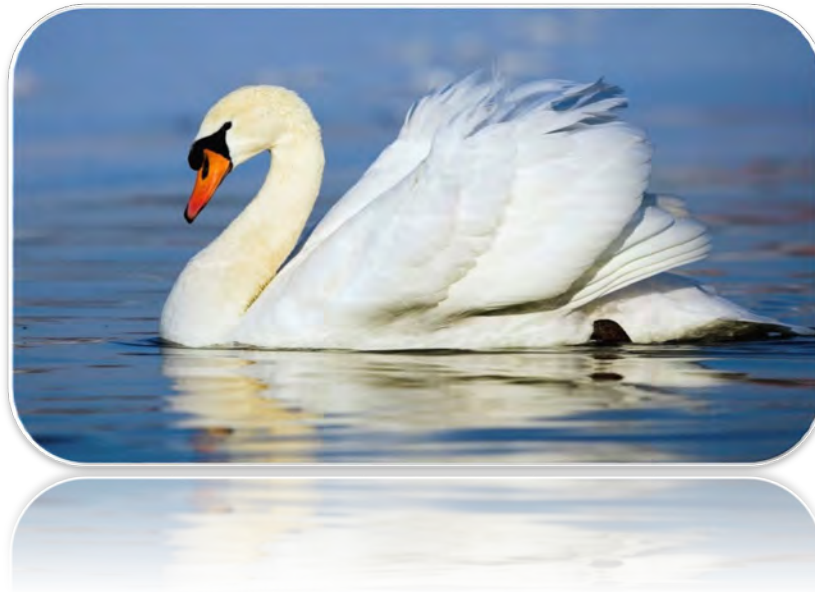
<https://www.myfloridalegal.com/sites/default/files/2023-05/opengovernmentoverview.pdf>

Office of the Attorney General 2-hour Audio Presentation regarding Public Meetings and Public Records Law:

<https://www.myfloridalegal.com/sites/default/files/Full%2520audio%25202018%5B2%5D.mp3>

As always, if you have any questions regarding this information, please feel free to contact me directly at 954-658-4900.

MARION RANCH COMMUNITY DEVELOPMENT DISTRICT



FINANCIAL STATEMENTS – MARCH 2024

FISCAL YEAR 2024

PREPARED BY:

JPWARD & ASSOCIATES, LLC, 2301 NORTHEAST 37TH STREET, FORT LAUDERDALE, FL 33308

T: 954-658-4900 E: JimWard@JPWardAssociates.com

JPWard and Associates, LLC

Community Development District Advisors

*Marion Ranch
Community Development District*

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JPWard & Associates, LLC

2301 NORTHEAST 37 STREET
FORT LAUDERDALE,
FLORIDA 33308

**Marion Ranch
Community Development District
Balance Sheet
for the Period Ending March 31, 2024**

Governmental Funds				
	General Fund	Account Groups		Totals (Memorandum Only)
		General Long Term Debt	General Fixed Assets	
Assets				
Cash and Investments				
General Fund - Invested Cash	\$ 45,154	\$ -	\$ -	\$ 45,154
Debt Service Fund				
Interest Account			-	\$ -
Sinking Account			-	\$ -
Reserve Account				\$ -
Revenue Account			-	\$ -
Capitalized Interest			-	\$ -
Prepayment Account			-	\$ -
Construction Account				\$ -
Cost of Issuance Account				\$ -
Due from Other Funds				
General Fund	-	-	-	-
Debt Service Fund(s)	-	-	-	-
Accounts Receivable	-	-	-	-
Assessments Receivable	-	-	-	-
Amount Available in Debt Service Funds	-	-	-	-
Amount to be Provided by Debt Service Funds	-	-	-	-
Total Assets	<u>\$ 45,154</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 45,154</u>
Liabilities				
Accounts Payable & Payroll Liabilities	\$ -	\$ -	\$ -	\$ -
Due to Fiscal Agent				
Due to Other Funds				
General Fund	-	-	-	-
Debt Service Fund(s)	-	-	-	-
Due to Developer				
Bonds Payable				
Current Portion		-	-	-
Long Term			-	-
Unamortized Prem/Discount on Bds Pyb			-	-
Total Liabilities	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>
Fund Equity and Other Credits				
Investment in General Fixed Assets				
Fund Balance				
Restricted				
Beginning: October 1, 2023 (Unaudited)	-	-	-	-
Results from Current Operations	-	-	-	-
Unassigned				
Beginning: October 1, 2023 (Unaudited)	-	-	-	-
Results from Current Operations	45,154	-	-	45,154
Total Fund Equity and Other Credits	<u>\$ 45,154</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 45,154</u>
Total Liabilities, Fund Equity and Other Credits	<u>\$ 45,154</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 45,154</u>

**Marion Ranch
Community Development District
General Fund
Statement of Revenues, Expenditures and Changes in Fund Balance
Through March 31, 2024**

Description	March	Year to Date	Total Annual Budget	% of Budget
Revenue and Other Sources				
Carryforward	\$ -	\$ -	\$ -	N/A
Interest				
Interest - General Checking	-	-	-	N/A
Special Assessment Revenue				
Special Assessments - On-Roll	-	-	-	N/A
Special Assessments - Off-Roll	-	-	-	N/A
Developer Contribution	57,563	57,563	-	N/A
Total Revenue and Other Sources:	\$ 57,563	\$ 57,563	\$ -	N/A
Expenditures and Other Uses				
Legislative				
Board of Supervisor's Fees	-	-	-	N/A
Executive				
Professional Management	-	-	-	N/A
Financial and Administrative				
Audit Services	-	-	-	N/A
Accounting Services	-	-	-	N/A
Assessment Roll Preparation	-	-	-	N/A
Arbitrage Rebate Services	-	-	-	N/A
Other Contractual Services				
Legal Advertising	836	836	-	N/A
Trustee Services	-	-	-	N/A
Dissemination Agent Services	-	-	-	N/A
Property Appraiser Fees	-	-	-	N/A
Bank Service Fees	-	-	-	N/A
Travel and Per Diem	-	-	-	N/A
Communications & Freight Services				
Postage, Freight & Messenger	30	30	-	N/A
Rentals and Leases				
Meeting Room Rental	-	-	-	N/A
Insurance	3,740	3,740	-	N/A
Printing & Binding	1,089	1,089	-	N/A
Website Development	-	-	-	N/A
Subscription & Memberships	150	150	-	N/A
Legal Services				
Legal - General Counsel	3,588	3,588	-	N/A
Legal - Validation	2,977	2,977	-	N/A

Prepared by:

JPWARD and Associates, LLC

**Marion Ranch
Community Development District
General Fund
Statement of Revenues, Expenditures and Changes in Fund Balance
Through March 31, 2024**

Description	March	Year to Date	Total Annual Budget	% of Budget
Legal - Boundary Amendment	-	-	-	N/A
Other General Government Services				
Engineering Services	-	-	-	N/A
Contingencies	-	-	-	N/A
Capital Outlay	-	-	-	N/A
Other Fees and Charges				
Discounts/Collection Fees	-	-	-	N/A
Sub-Total:	12,409	12,409	-	N/A
Total Expenditures and Other Uses:	\$ 12,409	\$ 12,409	\$ -	N/A
Net Increase/ (Decrease) in Fund Balance	45,154	45,154	-	
Fund Balance - Beginning	-	-	-	
Fund Balance - Ending	\$ 45,154	45,154	\$ -	