CARLTON LAKES
COMMUNITY DEVELOPMENT DISTRICT
BOARD OF SUPERVISORS
REGULAR MEETING
MAY 07, 2020

CARLTON LAKES
COMMUNITY DEVELOPMENT DISTRICT AGENDA
MAY 07, 2020 AT 1:30 P.M.
CALL IN NUMBER: 1-866-906-9330 ACCESS CODE: 4863181

District Board of Supervisors	Chairman	Jeffery Hills
	Vice Chairman	Ryan Motko
	Supervisor	Kelly Evans
	Supervisor	Nicholas Dister
	Supervisor	Chloe Firebaugh
District Manager	Meritus Districts	Nicole Hicks
District Attorney	Straley Robin Vericker	John Vericker
District Engineer	Stantec (Interim)	Tonja Stewart

All cellular phones and pagers must be turned off while in the meeting room

The meeting will begin at **1:30 p.m.** Following the **Call to Order**, the public has the opportunity to comment on posted agenda items during the second section called **Public Comments on Agenda Items**. Each individual is limited to **three (3) minutes** for such comment. The Board is not required to take action at this time, but will consider the comments presented as the agenda progresses. The third section is called **Business Items.** This section contains items for approval by the District Board of Supervisors that may require discussion, motions, and votes on an item-by-item basis. If any member of the audience would like to speak on one of the business items, they will need to register with the District Administrator prior to the presentation of that agenda item. Agendas can be reviewed by contacting the Manager's office at (813) 873-7300 at least seven days in advance of the scheduled meeting. Requests to place items on the agenda must be submitted in writing with an explanation to the District Manager at least fourteen (14) days prior to the date of the meeting. The fourth section is called **Consent Agenda**. The Consent Agenda section contains items that require the review and approval of the District Board of Supervisors as a normal course of business. The fifth section is called **Vendor/Staff Reports**. This section allows the District Administrator, Engineer, and Attorney to update the Board of Supervisors on any pending issues that are being researched for Board action. The sixth section is called **Supervisor Requests**. This is the section in which the Supervisors may request Staff to prepare certain items in an effort to meet the District's needs. The final section is called **Audience Questions, Comments and Discussion Forum**. This portion of the agenda is where individuals may comment on matters that concern the District. The Board of Supervisors or Staff is not obligated to provide a response until sufficient time for research or action is warranted.

Pursuant to provisions of the Americans with Disabilities Act, any person requiring special accommodations to participate in this meeting is asked to advise the District Office at (813) 873-7300, at least 48 hours before the meeting. If you are hearing or speech impaired, please contact the Florida Relay Service at 7-1-1, who can aid you in contacting the District Office.

Any person who decides to appeal any decision made by the Board with respect to any matter considered at the meeting is advised that this same person will need a record of the 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 the appeal is to be based.

Agendas can be reviewed by contacting the Manager's office at (813) 873-7300 at least seven days in advance of the scheduled meeting. Requests to place items on the agenda must be submitted in writing with an explanation to the District Manager at least fourteen (14) days prior to the date of the meeting.

Board of Supervisors
Carlton Lakes Community Development District

Dear Board Members:

The Regular Meeting of the Board of Supervisors of the Carlton Lakes Community Development District will be held on **Thursday, May 07, 2020 at 1:30 p.m.** via conference call at the information listed below. Following is the agenda for the meeting:

Call In Number: 1-866-906-9330 **Access Code: 4863181**

1. **CALL TO ORDER/ROLL CALL**
2. **PUBLIC COMMENT ON AGENDA ITEMS**
3. **BUSINESS ITEMS**
   A. Consideration of Resolution 2020-01; Approving Fiscal Year 2021 Proposed Budget & Setting Public Hearing……Tab 01
   B. Consideration of Resolution 2020-02; Adopting Statutory Alternative Investment Policies……...Tab 02
   C. Annual Disclosure of Qualified Electors……...Tab 03
   D. Consideration of Resolution 2020-03; Setting Landowners Election & Meeting……Tab 04
   E. Discussion on Landscape Maintenance Proposals……Tab 05
      a. ASI Landscape Management……Page 25
      b. Brightview Landscape Maintenance……...Page 46
      c. Buccaneer Landscape Management……...Page 91
      d. Duval Landscape Maintenance……...Page 116
   F. Discussion on Acceptance of Compensation for Board Members
   G. General Matters of the District
4. **CONSENT AGENDA**
   A. Consideration of Minutes of the Public Hearing & Regular Meeting August 22, 2019……..Tab 06
   B. Consideration of Operation and Maintenance Expenditures August – September 2019……...Tab 07
   C. Consideration of Operation and Maintenance Expenditures October 2019 – March 2020 ……..Tab 08
   D. Review of Financial Statements Month Ending March 31, 2020……..Tab 09
5. **VENDOR/STAFF REPORTS**
   A. District Counsel
   B. District Engineer
   C. District Manager
6. **BOARD OF SUPERVISORS REQUESTS AND COMMENTS**
7. **AUDIENCE QUESTIONS, COMMENTS AND DISCUSSION FORUM**
8. **ADJORNMENT**

We look forward to seeing you at the meeting. In the meantime, if you have any questions, please do not hesitate to call us at (813) 873-7300.

Sincerely,

Nicole Hicks
District Manager

RESOLUTION 2020-01

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE CARLTON LAKES COMMUNITY DEVELOPMENT DISTRICT APPROVING A PROPOSED OPERATION AND MAINTENANCE BUDGET FOR FISCAL YEAR 2020/2021; SETTING A PUBLIC HEARING THEREON PURSUANT TO FLORIDA LAW; ADDRESSING TRANSMITTAL, POSTING, AND PUBLICATION REQUIREMENTS; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the District Manager prepared and submitted to the Board of Supervisors (**"Board"**) of the Carlton Lakes Community Development District (**"District"**) prior to June 15, 2020 a proposed operation and maintenance budget for the fiscal year beginning October 1, 2020 and ending September 30, 2021 (**"Proposed Budget"**); and

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

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE CARLTON LAKES COMMUNITY DEVELOPMENT DISTRICT:

1. **PROPOSED BUDGET APPROVED**. The Proposed Budget, including any modifications made by the Board, attached hereto as **Exhibit A** is hereby approved as the basis for conducting a public hearing to adopt said Proposed Budget.

2. **SETTING A PUBLIC HEARING**. The public hearing on said Proposed Budget is hereby declared and set for the following date, hour, and location:

DATE:	August 6, 2020
HOUR:	1:30 p.m.
LOCATION*:	Meritus 2005 Pan Am Circle, Suite 300 Tampa, FL 33607

**Please note that pursuant to Governor DeSantis' Executive Order 20-69 (as it may be extended or amended) relating to the COVID-19 public health emergency and to protect the public and follow the CDC guidance regarding social distancing, such public hearing and meeting may be held telephonically or virtually. Please check on the District's website for the latest information: http://carltonlakescdd.org/.*

3. **TRANSMITTAL OF PROPOSED BUDGET TO LOCAL GENERAL PURPOSE GOVERNMENT**. The District Manager is hereby directed to submit a copy of the Proposed Budget to Hillsborough County at least 60 days prior to the hearing set above.

4. **POSTING OF PROPOSED BUDGET**. 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 and shall remain on the website for at least 45 days.

5. **PUBLICATION OF NOTICE**. Notice of this public hearing shall be published in the manner prescribed by Florida law.

6. **EFFECTIVE DATE**. This Resolution shall take effect immediately upon adoption.

PASSED AND ADOPTED ON MAY 7, 2020.

Attest:	**Carlton Lakes Community Development District**
_____	_____
Print Name:_____	Jeff Hills
Secretary / Assistant Secretary	Chair of the Board of Supervisors

Exhibit A: Proposed Budget for Fiscal Year 2020/2021

2021

CARLTON LAKES
COMMUNITY DEVELOPMENT DISTRICT

FISCAL YEAR 2021
PROPOSED ANNUAL OPERATING BUDGET

MAY 7, 2020

CARLTON LAKES
COMMUNITY DEVELOPMENT DISTRICT

FISCAL YEAR 2021
PROPOSED ANNUAL OPERATING BUDGET

TABLE OF CONTENTS

SECTION	DESCRIPTION	PAGE
I.	BUDGET INTRODUCTION	1
II	FISCAL YEAR 2020 BUDGET ANALYSIS	2
III.	PROPOSED OPERATING BUDGET	3
IV.	GENERAL FUND 001 DESCRIPTIONS	4
V.	DEBT SERVICE FUNDS	7
VI.	SCHEDULE OF ANNUAL ASSESSMENTS	10

MAY 7, 2020

BUDGET INTRODUCTION

Background Information

The Carlton Lakes Community Development District is a local special purpose government authorized by Chapter 190, Florida Statutes, as amended. The Community Development District (CDD) is an alternative method for planning, financing, acquiring, operating and maintaining community-wide infrastructure in master planned communities. The CDD also is a mechanism that provides a "solution" to the State's needs for delivery of capital infrastructure to service projected growth without overburdening other governments and their taxpayers. CDDs represent a major advancement in Florida's effort to manage its growth effectively and efficiently. This allows the community to set a higher standard for construction along with providing a long-term solution to the operation and maintenance of community facilities.

The following report represents the District budget for Fiscal Year 2021, which begins on October 1, 2020. The District budget is organized by fund to segregate financial resources and ensure that the segregated resources are used for their intended purpose, and the District has established the following funds.

Fund Number	Fund Name	Services Provided
001	General Fund	Operations and Maintenance of Community Facilities Financed by Non-Ad Valorem Assessments
200	Debt Service Fund	Collection of Special Assessments for Debt Service on the Series 2015 Capital Improvement Revenue Bonds
201	Debt Service Fund	Collection of Special Assessments for Debt Service on the Series 2017 Special Assessment Revenue Bonds
202	Debt Service Fund	Collection of Special Assessments for Debt Service on the Series 2018 Special Assessment Revenue Bonds

Facilities of the District

The District's existing facilities include storm-water management (lake and water control structures), wetland preserve areas, street lighting, landscaping, entry signage, entry features, irrigation distribution facilities, recreational center, parks, pool facility, tennis courts and other related public improvements.

Maintenance of the Facilities

In order to maintain the facilities, the District conducts hearings to adopt an operating budget each year. This budget includes a detailed description of the maintenance program along with an estimate of the cost of the program. The funding of the maintenance budget is levied as a non-ad valorem assessment on your property by the District Board of Supervisors.

CARLTON LAKES
COMMUNITY DEVELOPMENT DISTRICT

	Fiscal Year 2020 Final Operating Budget	Current Period Actuals 10/1/19 - 2/29/20	Projected Revenues & Expenditures 3/1/20 to 9/30/20	Total Actuals and Projections Through 9/30/20	Over/(Under) Budget Through 9/30/20
REVENUES					
SPECIAL ASSESSMENTS - SERVICE CHARGES					
Operations & Maintenance Assmts-Tax Roll	623,132.75	591,525.97	31,606.78	623,132.75	0.00
Operations & Maintenance Assmts-Off Roll	34,884.25	11,408.07	5,310.65	16,718.72	(18,165.53)
TOTAL SPECIAL ASSESSMENTS - SERVICE CHARGES	**$658,017.00**	**$602,934.04**	**$36,917.43**	**$639,851.47**	**($18,165.53)**
INTEREST EARNINGS					
Interest Earnings	0.00	29.42	0.00	29.42	29.42
TOTAL INTEREST EARNINGS	**$0.00**	**$29.42**	**$0.00**	**$29.42**	**$29.42**
CONTRIBUTIONS & DONATIONS FROM PRIVATE SOURCES					
Developer Contributions	0.00	3,580.97	0.00	3,580.97	3,580.97
TOTAL CONTRIBUTIONS & DONATIONS FROM PRIVATE SOURCES	**$0.00**	**$3,580.97**	**$0.00**	**$3,580.97**	**$3,580.97**
Other Miscellaneous Revenues					
Clubhouse Rentals	0.00	50.00	0.00	50.00	50.00
TOTAL Other Miscellaneous Revenues	**$0.00**	**$50.00**	**$0.00**	**$50.00**	**$50.00**
TOTAL REVENUES	**$658,017.00**	**$606,594.43**	**$36,917.43**	**$643,511.86**	**($14,505.14)**
EXPENDITURES					
FINANCIAL & ADMINISTRATIVE					
District Manager	44,000.00	22,157.75	21,842.25	44,000.00	0.00
District Engineer	4,750.00	3,635.00	1,115.00	4,750.00	0.00
Disclosure Report	10,900.00	0.00	10,900.00	10,900.00	0.00
Trustees Fees	12,000.00	8,873.19	3,126.81	12,000.00	0.00
Accounting Services	1,500.00	625.00	3,875.00	4,500.00	3,000.00
Auditing Services	8,000.00	4,569.00	3,431.00	8,000.00	0.00
Postage, Phone, Faxes, Copies	750.00	31.98	318.02	350.00	(400.00)
Public Officials Insurance	2,000.00	1,110.70	389.30	1,500.00	(500.00)
Legal Advertising	1,500.00	17.50	1,482.50	1,500.00	0.00
Bank Fees	100.00	12.50	62.50	75.00	(25.00)
Dues, Licenses & Fees	175.00	248.89	26.11	275.00	100.00
Website Administration	1,500.00	2,125.00	875.00	3,000.00	1,500.00
ADA Website Compliance	0.00	0.00	0.00	0.00	0.00
TOTAL FINANCIAL & ADMINISTRATIVE	**$87,175.00**	**$43,406.51**	**$47,443.49**	**$90,850.00**	**$3,675.00**
LEGAL COUNSEL					
District Counsel	10,000.00	915.00	4,085.00	5,000.00	(5,000.00)
TOTAL LEGAL COUNCEL	**$10,000.00**	**$915.00**	**$4,085.00**	**$5,000.00**	**($5,000.00)**
ELECTRIC UTILITY SERVICES					
Electric Utility Services	150,000.00	58,838.73	91,161.27	150,000.00	0.00
Decorative Light Maintenance	5,000.00	0.00	1,000.00	1,000.00	(4,000.00)
TOTAL ELECTRIC UTILITY SERVICES	**$155,000.00**	**$58,838.73**	**$92,161.27**	**$151,000.00**	**($4,000.00)**
GARBAGE/SOLID WASTE CONTROL SERVICES					
Garbage Collection	1,200.00	2,047.02	2,952.98	5,000.00	3,800.00
TOTAL GARBAGE/SOLID WASTE CONTROL SERVICES	**$1,200.00**	**$2,047.02**	**$2,952.98**	**$5,000.00**	**$3,800.00**
WATER-SEWER COMBINATION SERVICES					
Water Utility Services	11,500.00	3,613.33	7,386.67	11,000.00	(500.00)
TOTAL WATER-SEWER COMBINATION SERVICES	**$11,500.00**	**$3,613.33**	**$7,386.67**	**$11,000.00**	**($500.00)**
OTHER PHYSICAL ENVIRONMENT					
Staff	60,000.00	0.00	45,000.00	45,000.00	(15,000.00)
Waterway Management Program	22,000.00	3,325.00	14,675.00	18,000.00	(4,000.00)
Property & Casualty Insurance	26,142.00	10,108.90	15,891.10	26,000.00	(142.00)
Club Facility Maintenance	30,000.00	20,859.64	24,140.36	45,000.00	15,000.00
Landscape Maintenance - Contract	210,000.00	74,781.34	120,218.66	195,000.00	(15,000.00)
Landscape Maintenance - Other	15,000.00	4,215.00	10,785.00	15,000.00	0.00
Plant Replacement Program	5,000.00	0.00	5,000.00	5,000.00	0.00
Irrigation Maintenance	10,000.00	817.18	4,182.82	5,000.00	(5,000.00)
Pool Maintenance	15,000.00	6,403.07	13,596.93	20,000.00	5,000.00
TOTAL OTHER PHYSICAL ENVIRONMENT	**$393,142.00**	**$120,510.13**	**$253,489.87**	**$374,000.00**	**($19,142.00)**
CAPITAL RESERVE					
Reserve	0.00	0.00	6,661.86	6,661.86	6,661.86
TOTAL CAPITAL RESERVE	**$0.00**	**$0.00**	**$6,661.86**	**$6,661.86**	**$6,661.86**
TOTAL EXPENDITURES	**$658,017.00**	**$229,330.72**	**$414,181.14**	**$643,511.86**	**($14,505.14)**
EXCESS OF REVENUES OVER (UNDER) EXPENDITURES	**$0.00**	**$377,263.71**	**($377,263.71)**	**$0.00**	**$0.00**

FISCAL YEAR 2020 BUDGET ANALYSIS

CARLTON LAKES
COMMUNITY DEVELOPMENT DISTRICT

	Fiscal Year 2020 Final Operating Budget	Total Actuals and Projections Through 9/30/20	Over/(Under) Budget Through 9/30/20	Fiscal Year 2021 Proposed Operating Budget	Increase / (Decrease) from FY 2020 to FY 2021
REVENUES					
SPECIAL ASSESSMENTS - SERVICE CHARGES					
Operations & Maintenance Assmts-Tax Roll	623,132.75	623,132.75	0.00	650,866.81	27,734.06
Operations & Maintenance Assmts-Off Roll	34,884.25	16,718.72	(18,165.53)	6,650.19	(28,234.06)
TOTAL SPECIAL ASSESSMENTS - SERVICE CHARGES	**$658,017.00**	**$639,851.47**	**($18,165.53)**	**$657,517.00**	**($500.00)**
INTEREST EARNINGS					
Interest Earnings	0.00	29.42	29.42	0.00	0.00
TOTAL INTEREST EARNINGS	**$0.00**	**$29.42**	**$29.42**	**$0.00**	**$0.00**
CONTRIBUTIONS & DONATIONS FROM PRIVATE SOURCES					
Developer Contributions	0.00	3,580.97	3,580.97	0.00	0.00
TOTAL CONTRIBUTIONS & DONATIONS FROM PRIVATE SOURCES	**$0.00**	**$3,580.97**	**$3,580.97**	**$0.00**	**$0.00**
Other Miscellaneous Revenues					
Clubhouse Rentals	0.00	50.00	50.00	500.00	500.00
TOTAL Other Miscellaneous Revenues	**$0.00**	**$50.00**	**$50.00**	**$500.00**	**$500.00**
TOTAL REVENUES	**$658,017.00**	**$643,511.86**	**($14,505.14)**	**$658,017.00**	**($0.00)**
EXPENDITURES					
LEGISLATIVE					
Supervisor Fees	0.00	0.00	0.00	4,000.00	4,000.00
TOTAL LEGISLATIVE	**$0.00**	**$0.00**	**$0.00**	**$4,000.00**	**$4,000.00**
FINANCIAL & ADMINISTRATIVE					
District Manager	44,000.00	44,000.00	0.00	44,000.00	0.00
District Engineer	4,750.00	4,750.00	0.00	4,750.00	0.00
Disclosure Report	10,900.00	10,900.00	0.00	10,900.00	0.00
Trustees Fees	12,000.00	12,000.00	0.00	12,000.00	0.00
Accounting Services	1,500.00	4,500.00	3,000.00	1,500.00	0.00
Auditing Services	8,000.00	8,000.00	0.00	8,000.00	0.00
Postage, Phone, Faxes, Copies	750.00	350.00	(400.00)	750.00	0.00
Public Officials Insurance	2,000.00	1,500.00	(500.00)	1,800.00	(200.00)
Legal Advertising	1,500.00	1,500.00	0.00	1,500.00	0.00
Bank Fees	100.00	75.00	(25.00)	100.00	0.00
Dues, Licenses & Fees	175.00	275.00	100.00	250.00	75.00
Website Administration	1,500.00	3,000.00	1,500.00	1,500.00	0.00
ADA Website Compliance	0.00	0.00	0.00	1,800.00	1,800.00
TOTAL FINANCIAL & ADMINISTRATIVE	**$87,175.00**	**$90,850.00**	**$3,675.00**	**$88,850.00**	**$1,675.00**
LEGAL COUNSEL					
District Counsel	10,000.00	5,000.00	(5,000.00)	8,000.00	(2,000.00)
TOTAL LEGAL COUNCEL	**$10,000.00**	**$5,000.00**	**($5,000.00)**	**$8,000.00**	**($2,000.00)**
ELECTRIC UTILITY SERVICES					
Electric Utility Services	150,000.00	150,000.00	0.00	150,000.00	0.00
Decorative Light Maintenance	5,000.00	1,000.00	(4,000.00)	2,000.00	(3,000.00)
TOTAL ELECTRIC UTILITY SERVICES	**$155,000.00**	**$151,000.00**	**($4,000.00)**	**$152,000.00**	**($3,000.00)**
GARBAGE/SOLID WASTE CONTROL SERVICES					
Garbage Collection	1,200.00	5,000.00	3,800.00	5,000.00	3,800.00
TOTAL GARBAGE/SOLID WASTE CONTROL SERVICES	**$1,200.00**	**$5,000.00**	**$3,800.00**	**$5,000.00**	**$3,800.00**
WATER-SEWER COMBINATION SERVICES					
Water Utility Services	11,500.00	11,000.00	(500.00)	11,500.00	0.00
TOTAL WATER-SEWER COMBINATION SERVICES	**$11,500.00**	**$11,000.00**	**($500.00)**	**$11,500.00**	**$0.00**
OTHER PHYSICAL ENVIRONMENT					
Staff	60,000.00	45,000.00	(15,000.00)	59,667.00	(333.00)
Waterway Management Program	22,000.00	18,000.00	(4,000.00)	20,000.00	(2,000.00)
Property & Casualty Insurance	26,142.00	26,000.00	(142.00)	26,000.00	(142.00)
Club Facility Maintenance	30,000.00	45,000.00	15,000.00	39,000.00	9,000.00
Landscape Maintenance - Contract	210,000.00	195,000.00	(15,000.00)	193,000.00	(17,000.00)
Landscape Maintenance - Other	15,000.00	15,000.00	0.00	15,000.00	0.00
Plant Replacement Program	5,000.00	5,000.00	0.00	8,000.00	3,000.00
Irrigation Maintenance	10,000.00	5,000.00	(5,000.00)	10,000.00	0.00
Pool Maintenance	15,000.00	20,000.00	5,000.00	18,000.00	3,000.00
TOTAL OTHER PHYSICAL ENVIRONMENT	**$393,142.00**	**$374,000.00**	**($19,142.00)**	**$388,667.00**	**($4,475.00)**
CAPITAL RESERVE					
Reserve	0.00	6,661.86	6,661.86	0.00	0.00
TOTAL CAPITAL RESERVE	**$0.00**	**$6,661.86**	**$6,661.86**	**$0.00**	**$0.00**
TOTAL EXPENDITURES	**$658,017.00**	**$643,511.86**	**($14,505.14)**	**$658,017.00**	**$0.00**
EXCESS OF REVENUES OVER (UNDER) EXPENDITURES	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**($0.00)**

Financial & Administrative

District Manager

The District retains the services of a consulting manager, who is responsible for the daily administration of the District's business, including any and all financial work related to the Bond Funds and Operating Funds of the District, and preparation of the minutes of the Board of Supervisors. In addition, the District Manager prepares the Annual Budget(s), implements all policies of the Board of Supervisors, and attends all meetings of the Board of Supervisors.

District Engineer

Consists of attendance at scheduled meetings of the Board of Supervisors, offering advice and consultation on all matters related to the works of the District, such as bids for yearly contracts, operating policy, compliance with regulatory permits, etc.

Disclosure Reporting

On a quarterly and annual basis, disclosure of relevant district information is provided to the Muni Council, as required within the bond indentures.

Trustees Fees

This item relates to the fee assessed for the annual administration of bonds outstanding, as required within the bond indentures.

Auditing Services

The District is required to annually undertake an independent examination of its books, records and accounting procedures. This audit is conducted pursuant to State Law and the Rules of the Auditor General.

Postage, Phone, Fax, Copies

This item refers to the cost of materials and service to produce agendas and conduct day-to-day business of the District.

Miscellaneous Administration

This is required of the District to store its official records.

Public Officials Insurance

The District carries Public Officials Liability in the amount of $1,000,000.

Legal Advertising

This is required to conduct the official business of the District in accordance with the Sunshine Law and other advertisement requirements as indicated by the Florida Statutes.

Bank Fees

The District operates a checking account for expenditures and receipts.

Dues, Licenses & Fees

The District is required to file with the County and State each year.

Miscellaneous Fees
To provide for unbudgeted administrative expenses.

Investment Reporting Fees
This is to provide an investment report to the District on a quarterly basis.

Office Supplies
Cost of daily supplies required by the District to facilitate operations.

Technology Services
This is to upgrade and keep current the operating components to comply with new governmental accounting standards along with basic website maintenance.

Website Administration
This is for maintenance and administration of the Districts official website.

Capital Outlay
This is to purchase new equipment as required.

Legal Counsel

District Counsel
Requirements for legal services are estimated at an annual expenditures on an as needed and also cover such items as attendance at scheduled meetings of the Board of Supervisor's, Contract preparation and review, etc.

Electric Utility Services

Electric Utility Services
This item is for street lights, pool, recreation facility and other common element electricity

Garbage/Solid Waste Control Services

Garbage Collection
This item is for pick up at the recreation facility and parks as needed.

Water-Sewer Combination Services

Water Utility Services
This item is for the potable and non-potable water used for irrigation.

Other Physical Environment

Waterway Management System
This item is for maintaining the multiple waterways that compose the District's waterway management system and aids in controlling nuisance vegetation that may otherwise restrict the flow of water.

Property & Casualty Insurance
The District carries $1,000,000 in general liability and also has sovereign immunity.

Entry & Walls Maintenance
This item is for maintaining the main entry feature and other common area walls.

GENERAL FUND 001

Landscape Maintenance

The District contracts with a professional landscape firm to provide service through a public bid process. This fee does not include replacement material or irrigation repairs.

Miscellaneous Landscape

This item is for any unforeseen circumstances that may effect the appearance of the landscape program.

Plant Replacement Program

This item is for landscape items that may need to be replaced during the year.

Property Taxes

This item is for property taxes assessed to lands within the District.

Irrigation Maintenance

Repairs necessary for everyday operation of the irrigation system to ensure its effectiveness.

Pool Maintenance

This item is necessary to contract with a vendor to maintain the pool within state guidelines for public use.

Clubhouse Maintenance

This item provides for operations, maintenance, and supplies to the District's Amenity Center.

CARLTON LAKES
COMMUNITY DEVELOPMENT DISTRICT

DEBT SERVICE FUND
SERIES 2015

REVENUES		
CDD Debt Service Assessments	$	505,969
TOTAL REVENUES	**$**	**505,969**

EXPENDITURES		
Series 2015 May Bond Interest Payment	$	192,984
Series 2015 November Bond Principal Payment	$	120,000
Series 2015 November Bond Interest Payment	$	192,984
TOTAL EXPENDITURES	**$**	**505,969**
EXCESS OF REVENUES OVER EXPENDITURES	**$**	**-**

ANALYSIS OF BONDS OUTSTANDING		
Bonds Outstanding - Period Ending 11/1/2020	$	6,890,000
Principal Payment Applied Toward Series 2015 Bonds	$	120,000
Bonds Outstanding - Period Ending 11/1/2021	**$**	**6,770,000**

CARLTON LAKES
COMMUNITY DEVELOPMENT DISTRICT

DEBT SERVICE FUND
SERIES 2017

REVENUES		
CDD Debt Service Assessments	$	255,050
TOTAL REVENUES	**$**	**255,050**

EXPENDITURES		
Series 2017 May Bond Interest Payment	$	92,525
Series 2017 November Bond Principal Payment	$	70,000
Series 2017 November Bond Interest Payment	$	92,525
TOTAL EXPENDITURES	**$**	**255,050**
EXCESS OF REVENUES OVER EXPENDITURES	**$**	**-**

ANALYSIS OF BONDS OUTSTANDING		
Bonds Outstanding - Period Ending 11/1/2020	$	3,740,000
Principal Payment Applied Toward Series 2017 Bonds	$	70,000
Bonds Outstanding - Period Ending 11/1/2021	**$**	**3,670,000**

CARLTON LAKES
COMMUNITY DEVELOPMENT DISTRICT

DEBT SERVICE FUND
SERIES 2018

REVENUES		
CDD Debt Service Assessments	$	281,344
TOTAL REVENUES	**$**	**281,344**

EXPENDITURES		
Series 2018 May Bond Principal Payment	$	70,000
Series 2018 May Bond Interest Payment	$	106,372
Series 2018 November Bond Interest Payment	$	104,972
TOTAL EXPENDITURES	**$**	**281,344**
EXCESS OF REVENUES OVER EXPENDITURES	**$**	**-**

ANALYSIS OF BONDS OUTSTANDING		
Bonds Outstanding - Period Ending 11/1/2020	$	4,190,000
Principal Payment Applied Toward Series 2018 Bonds	$	70,000
Bonds Outstanding - Period Ending 11/1/2021	**$**	**4,120,000**

CARLTON LAKES
COMMUNITY DEVELOPMENT DISTRICT

SCHEDULE OF ANNUAL ASSESSMENTS

Lot Size	EBU Value	Unit Count	Debt Service Per Unit	O&M Per Unit	FY 2021 Total Assessment	FY 2020 Total Assessment	Total Increase / (Decrease) in Annual Assmt
SERIES 2015 BONDS							
Single Family 40'	1.00	80	$1,041.67	$746.23	**$1,787.90**	**$1,787.90**	$0.00
Single Family 50'	1.25	230	$1,302.08	$820.85	**$2,122.93**	**$2,122.93**	$0.00
Single Family 60'	1.50	114	$1,562.50	$894.05	**$2,456.55**	**$2,456.55**	$0.00
SERIES 2017 BONDS							
Single Family 40'	1.00	169	$1,041.67	$746.23	**$1,787.90**	**$1,787.90**	$0.00
Single Family 50'	1.25	54	$1,302.08	$820.85	**$2,122.93**	**$2,122.93**	$0.00
Single Family 60'	1.50	19	$1,562.50	$894.05	**$2,456.55**	**$2,456.55**	$0.00
SERIES 2018 BONDS							
Single Family 40'	1.00	96	$1,224.94	$746.23	**$1,971.17**	**$1,971.17**	$0.00
Single Family 50'	1.25	70	$1,531.18	$820.85	**$2,352.03**	**$2,352.03**	$0.00
Single Family 60'	1.50	37	$1,837.41	$894.05	**$2,731.46**	**$2,731.46**	$0.00
TOTAL COUNT		869					

Notations:

(1) Annual assessments are adjusted for the County collection costs and Statutory early payment discount.

RESOLUTION 2020-02

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE CARLTON LAKES COMMUNITY DEVELOPMENT DISTRICT RESCINDING RESOLUTION 2015-19 AND ANY OTHER PRIOR INVESTMENT POLICIES AND ELECTING TO USE THE STATUTORY DEFAULT INVESTMENT POLICIES FOR INVESTING PUBLIC FUNDS IN EXCESS OF THE AMOUNTS NEEDED TO MEET CURRENT EXPENSES IN ACCORDANCE WITH SECTION 218.415(17), FLORIDA STATUTES; PROVIDING FOR CONFLICTS; PROVIDING FOR SEVERABILITY; PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the Carlton Lakes Community Development District (the "**District**") is a local unit of special-purpose government created and existing pursuant to Chapter 190, Florida Statutes;

WHEREAS, the Board of Supervisors of the District (the "**Board**") previously adopted Resolution 2015-19 to establish a written investment policy in accordance with Section 218.415, Florida Statutes; and

WHEREAS, the Board desires to rescind Resolution 2015-19 and any other prior investment policies, to not adopt a written investment policy, and instead use the statutory default investment policies for the investment of public funds in excess of amounts needed to meet current expenses, in accordance with Section 218.415 (17), Florida Statutes.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD:

1. **Rescindment of Prior Investment Policies**. The Board hereby rescinds Resolution 2015-19 and any other prior investment policies in their entirety.

2. **Use of Statutory Default Investment Policies**. The Board hereby elects to use the statutory default alternative investment policies for the investment of public funds in excess of the amounts needed to meet current expenses, in accordance with Section 218.415(17), Florida Statutes, as amended.

3. **Conflicts**. All District resolutions or parts thereof or other adopted policies in actual conflict with this Resolution are, to the extent of such conflict, superseded and repealed.

4. **Severability**. If any section or part of a section of this Resolution is declared invalid or unconstitutional, the validity, force and effect of any other section or part of a section of this Resolution shall not thereby be affected or impaired unless it clearly appears that such other section or part of a section of this Resolution is wholly or necessarily dependent upon the section or part of a section so held to be invalid or unconstitutional.

5. **Effective Date**. This Resolution shall become effective upon adoption.

PASSED AND ADOPTED ON MAY 7, 2020.

Attest:	**Carlton Lakes Community Development District**
_____	_____
Print Name:_____	Jeff Hills
Secretary / Assistant Secretary	Chair of the Board of Supervisors

April 24, 2020

To Whom It May Concern:

As per F.S. 190.006, you'll find the number of qualified registered electors for your Community Development District as of April 15, 2020, listed below.

Community Development District	Number of Registered Electors
Carlton Lakes	1087

We ask that you respond to our office with a current list of CDD office holders by **June 1st** and that you update us throughout the year if there are changes. This will enable us to provide accurate information to potential candidates during filing and qualifying periods.

Please note it is the responsibility of each district to keep our office updated with current district information. If you have any questions, please do not hesitate to contact me at (813) 384-3944 or ewhite@hcsoe.org.

Respectfully,

Enjoli White

Enjoli White
Candidate Services Liaison

RESOLUTION 2020-03

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE CARLTON LAKES COMMUNITY DEVELOPMENT DISTRICT DESIGNATING A DATE, TIME AND LOCATION FOR A LANDOWNERS' MEETING; PROVIDING FOR PUBLICATION; PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the Carlton Lakes 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 Hillsborough County, Florida; and

WHEREAS, the District's Board of Supervisors ("Board") is statutorily authorized to exercise the powers granted to the District; and

WHEREAS, all meetings of the Board shall be open to the public and governed by provisions of Chapter 286, Florida Statutes; and

WHEREAS, the effective date of Ordinance No. 15-6 creating the District was the March 25, 2015, as amended; and

WHEREAS, the District is statutorily required to hold a meeting of the landowners of the District for the purpose of electing supervisors for the District on a date established by the Board, which shall be noticed pursuant to Section 190.006(2)(a), Florida Statutes.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE CARLTON LAKES COMMUNITY DEVELOPMENT DISTRICT:

Section 1. In accordance with Section 190.006(2), Florida Statutes, the meeting of the landowners to elect three (3) supervisors of the District, shall be held on November 3, 2020, at 1:30 p.m. at the offices of Meritus, 2005 Pan Am Circle, Suite 300, Tampa, Florida 33607.

Section 2. The District's Secretary is hereby directed to publish notice of this landowners' meeting in accordance with the requirements of Section 190.006(2)(a), Florida Statutes.

Section 3. Pursuant to Section 190.006(2)(b), Florida Statutes, the landowners' meeting and election has been announced by the Board at its May 7, 2020 meeting. A sample notice of landowners' meeting and election, proxy, ballot form and instructions were presented at such meeting and are attached hereto as **Exhibit A**. Such documents are available for review and copying during normal business hours at the District's Local Records Office, located at the office of the District Manager, Meritus, located at 2005 Pan Am Circle, Suite 300, Tampa, Florida 33607.

Section 4. This Resolution shall become effective immediately upon its adoption.

PASSED AND ADOPTED THIS 7TH DAY OF MAY, 2020.

ATTEST:	**CARLTON LAKES COMMUNITY DEVELOPMENT DISTRICT**
_____	_____
Print Name: _____	Print Name: _____
Secretary/ Assistant Secretary	Chair/ Vice Chair of the Board of Supervisors

EXHIBIT A

NOTICE OF LANDOWNERS' MEETING AND ELECTION AND MEETING OF THE BOARD OF SUPERVISORS OF THE CARLTON LAKES COMMUNITY DEVELOPMENT DISTRICT

Notice is hereby given to the public and all landowners within Carlton Lakes Community Development District (the **"District"**), the location of which is generally described as comprised of a parcel or parcels of land containing approximately 306.90 acres more or less, generally located north side of Balm Road (SR 672), east of US Highway 301, and south of Big Bend Road, Hillsborough County, Florida, advising that a meeting of landowners will be held for the purpose of electing three (3) persons to the District Board of Supervisors. Immediately following the landowners' meeting there will be convened a meeting of the Board of Supervisors for the purpose of considering certain matters of the Board to include election of certain District officers, and other such business which may properly come before the Board.

DATE:	November 3, 2020
TIME:	1:30 p.m.
PLACE:	The offices of Meritus 2005 Pan Am Circle, Suite 300 Tampa, Florida 33607

Each landowner may vote in person or by written proxy. Proxy forms may be obtained upon request at the office of the District Manager located at 2005 Pan Am Circle, Suite 300, Tampa, Florida 33607. At said meeting each landowner or his or her proxy shall be entitled to nominate persons for the position of Supervisor and cast one vote per acre of land, or fractional portion thereof, owned by him or her and located within the District for each person nominated for the position of Supervisor. A fraction of an acre shall be treated as one acre, entitling the landowner to one vote with respect thereto. Platted lots shall be counted individually and rounded up to the nearest whole acre. The acreage of platted lots shall not be aggregated for determining the number of voting units held by a landowner or a landowner's proxy. At the landowners' meeting the landowners shall select a person to serve as the meeting chair and who shall conduct the meeting.

The landowners' meeting and the Board of Supervisors meeting are open to the public and will be conducted in accordance with the provisions of Florida law. One or both of the meetings may be continued to a date, time, and place to be specified on the record at such meeting. A copy of the agenda for these meetings may be obtained from Meritus located at 2005 Pan Am Circle, Suite 300, Tampa, Florida 33607. There may be an occasion where one or more supervisors will participate by telephone.

Pursuant to the Americans with Disabilities Act, any person requiring special accommodations to participate in these meetings is asked to contact the District Office at (813) 873-7300, at least 48 hours before the hearing. If you are hearing or speech impaired, please contact the Florida Relay Service at 711 for aid in contacting the District Office.

A person who decides to appeal any decision made by the Board with respect to any matter considered at the meeting is advised that such person will need a record of the 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 the appeal is to be based.

Brian Lamb, District Manager

Run Date(s): October 7 and 14, 2020

EXHIBIT A

INSTRUCTIONS RELATING TO LANDOWNERS' MEETING OF THE CARLTON LAKES COMMUNITY DEVELOPMENT DISTRICT FOR THE ELECTION OF SUPERVISORS

DATE OF LANDOWNERS' MEETING: November 3, 2020

TIME: 1:30 p.m.

LOCATION: The offices of Meritus
2005 Pan Am Circle, Suite 300
Tampa, Florida 33607

Pursuant to Chapter 190, Florida Statutes, and after a community development district ("District") has been established and the landowners have held their initial election, there shall be a subsequent landowners' meeting for the purpose of electing members of the Board of Supervisors ("Board") every two years until the District qualifies to have its board members elected by the qualified electors of the District. The following instructions on how all landowners may participate in the election are intended to comply with Section 190.006(2)(b), Florida Statutes.

A landowner may vote in person at the landowners' meeting, or the landowner may nominate a proxy holder to vote at the meeting in place of the landowner. Whether in person or by proxy, each landowner shall be entitled to cast one vote per acre of land owned by him or her and located within the District, for each position on the Board that is open for election for the upcoming term. A fraction of an acre shall be treated as one (1) acre, entitling the landowner to one vote with respect thereto. Please note that a particular parcel of real property is entitled to only one vote for each eligible acre of land or fraction thereof; therefore, two or more people who own real property in common, that is one acre or less, are together entitled to only one vote for that real property.

At the landowners' meeting, the first step is to elect a chair for the meeting, who may be any person present at the meeting. The landowners shall also elect a secretary for the meeting who may be any person present at the meeting. The secretary shall be responsible for the minutes of the meeting. The chair shall conduct the nominations and the voting. If the chair is a landowner or proxy holder of a landowner, he or she may nominate candidates and make and second motions. Candidates must be nominated and then shall be elected by a vote of the landowners. Nominees may be elected only to a position on the Board that is open for election for the upcoming term.

This year, three (3) seats on the Board will be up for election by landowners, two (2) seats for a four year period and one (1) seat for a two year period. The term of office for each successful candidate shall commence upon election.

A proxy is available upon request. To be valid, each proxy must be signed by one of the legal owners of the property for which the vote is cast and must contain the typed or printed name of the individual who signed the proxy; the street address, legal description of the property or tax parcel identification number; and the number of authorized votes. If the proxy authorizes more than one vote, each property must be listed and the number of acres of each property must be included. The signature on a proxy does not need to be notarized.

EXHIBIT A

LANDOWNER PROXY

CARLTON LAKES COMMUNITY DEVELOPMENT DISTRICT
HILLSBOROUGH COUNTY, FLORIDA
LANDOWNERS' MEETING – NOVEMBER 3, 2020

KNOW ALL MEN BY THESE PRESENTS, that the undersigned, the fee simple owner of the lands described herein, hereby constitutes and appoints _____ ("Proxy Holder") for and on behalf of the undersigned, to vote as proxy at the meeting of the landowners of the Carlton Lakes Community Development District to be held at the offices of Meritus, located at 2005 Pan Am Circle, Suite 300, Tampa, Florida 33607, on November 3, 2020, at 1:30 p.m., and at any adjournments thereof, according to the number of acres of unplatted land and/or platted lots owned by the undersigned landowner that the undersigned would be entitled to vote if then personally present, upon any question, proposition, or resolution or any other matter or thing that may be considered at said meeting including, but not limited to, the election of members of the Board of Supervisors. Said Proxy Holder may vote in accordance with his or her discretion on all matters not known or determined at the time of solicitation of this proxy, which may legally be considered at said meeting.

Any proxy heretofore given by the undersigned for said meeting is hereby revoked. This proxy is to continue in full force and effect from the date hereof until the conclusion of the landowners' meeting and any adjournment or adjournments thereof, but may be revoked at any time by written notice of such revocation presented at the landowners' meeting prior to the Proxy Holder's exercising the voting rights conferred herein.

_____
Printed Name of Legal Owner

_____ _____
Signature of Legal Owner Date

Parcel Description	**Acreage**	**Authorized Votes**
_____		_____
_____		_____
_____		_____

[Insert above the street address of each parcel, the legal description of each parcel, or the tax identification number of each parcel. If more space is needed, identification of parcels owned may be incorporated by reference to an attachment hereto.]

Total Number of Authorized Votes: _____

NOTES: Pursuant to Section 190.006(2)(b), Florida Statutes, a fraction of an acre is treated as one (1) acre entitling the landowner to one vote with respect thereto. Moreover, two (2) or more persons who own real property in common that is one acre or less are together entitled to only one vote for that real property.

If the fee simple landowner is not an individual, and is instead a corporation, limited liability company, limited partnership or other entity, evidence that the individual signing on behalf of the entity has the authority to do so should be attached hereto (e.g., bylaws, corporate resolution, etc.).

EXHIBIT A

OFFICIAL BALLOT
CARLTON LAKES COMMUNITY DEVELOPMENT DISTRICT
HILLSBOROUGH COUNTY, FLORIDA
LANDOWNERS' MEETING – NOVEMBER 3, 2020

For Election (Three (3) Supervisors): The two candidates receiving the highest number of votes will receive a four (4) year term, and the one candidate receiving the lowest number of votes will receive a two (2) year term, with the term of office for each of the successful candidates commencing upon election.

The undersigned certifies that he/she/it is the fee simple owner of land, or the proxy holder for the fee simple owner of land, located within the Carlton Lakes Community Development District and described as follows:

Description	**Acreage**
_____	_____
_____	_____
_____	_____

[Insert above the street address of each parcel, the legal description of each parcel, or the tax identification number of each parcel.] [If more space is needed, identification of parcels owned may be incorporated by reference to an attachment hereto.]

or

Attach Proxy.

I, _____, as Landowner, or as the proxy holder of _____ (Landowner) pursuant to the Landowners' Proxy attached hereto, do cast my votes as follows:

NAME OF CANDIDATE	**NUMBER OF VOTES**
1. _____	____
2. _____	____
3. _____	____
4. _____	____
5. _____	____

Date:_____

Signed: _____
Printed Name: _____

LANDSCAPE PROPOSAL

CARLTON LAKES CDD

ASI LANDSCAPE MANAGEMENT

Table of Contents

COMPANY INFORMATION

Page 3 Introduction Letter

Page 4 Company History

PERSONNEL

Page 5-6 Leadership Team Biographies

Page 7 Key Personnel

Page 8 Licenses & Associations

EXPERIENCE

Page 9-10 Past Record of Similar Scope

Page 11 Letter of Recommendation

Page 12 Equipment List

Page 13 Hurricane Plan

PRICING

Page 14 *Service Proposal*

SERVICE AGREEMENT & SCOPE OF SERVICES

Page 15-21 General Contract Terms & Scope of Services

MISCELLANEOUS PROPOSAL ITEMS

ASI LANDSCAPE MANAGEMENT

April 21, 2020

Nicole Hicks
Property Manager
Carlton Lakes CDD
2005 Pan Am Cr. #300
Tampa, FL 33607

Dear Ms. Hicks:

On behalf of ASI Landscape Management, I am pleased to provide you and the board with our proposal for landscape services at Carlton Lakes. Our staff has thoroughly reviewed the specifications contained in your RFP and we are confident that ASI's experience and expertise will more than adequately meet or exceed your needs and expectations.

The competitive nature of the landscape industry offers a number of choices when it comes to selecting the right company. We are proud of our success and ASI has consistently demonstrated we are among the best in Central Florida when it comes to personalized and professional service. Our teams are highly trained technicians, detail oriented and focused on providing our clients with the best possible service. We view our client relationships as a partnership, thus ensuring mutual satisfaction and pride in the results.

Carlton Lakes is a beautiful community; It is obvious after visiting that the neighborhood takes exceptional pride in both the presentation and appeal. This is a property that excites us in that it offers the opportunity to showcase our work and provide the visual appeal and impact the residents expect. If awarded the account, ASI will assign a dedicated maintenance team consisting of a Client Relations Manager, Production Manager, Foreman (team lead), and dedicated crew members. The team will be managed by the Client Relations Manager and Branch Manager who will serve as our liaison to you. Additionally, the maintenance team will be augmented by professionals in our enhancement division, consisting of arborists, irrigation techs, and landscapers. We believe this approach will provide you unparalleled, consistent service and a direct communication link between our company and you.

We appreciate the opportunity to bid on your proposal and hope you will consider our offer favorably both in terms of content and cost. Please don't hesitate to call if you have questions or would like more detail on what we can provide. We look forward to your decision and the prospect of partnering and serving the residents of the Carlton Lakes community.

Sincerely,

M Moseley

Michael Moseley
Regional Business Developer

Company History

The history of ASI Landscape Management dates back to 1993 when Joe Chiellini and a close friend created a small residential land care business called Lawncombers USA. As firefighters for Hillsborough County, their goal was to earn extra money during the days they were off duty. Through hard work and dedication, Lawncombers quickly earned a reputation in the Tampa Bay area for providing quality and dependable service to their customers. As the business grew, so did the profits along with their ambition. The partners soon realized that more lucrative opportunities existed in the realm of commercial landscaping. Their first commercial opportunity came with the acquisition of a contract to service a shopping center and office building. Staying true to their business model and reputation for service and quality, word soon spread, and the company's growth opportunities expanded.

In 1999, Lawncombers USA merged with a local tree farm and ASI Landscape Management was born. This merger further enhanced the company by adding landscaping to the company's existing portfolio of basic lawn care. The company's growing base of new business accounts required help in the form of a skilled and capable workforce focused on the company's emergence into the high-end design/build arenas, commercial maintenance, arbor care, and horticultural services. Success and growth added additional business complexities including a familiarity with governmental regulations, environmental concerns, financial matters, and internal operations. The added responsibilities and accountability challenged the partners' original vision, which resulted in Chiellini gaining full control of the company in 2001. Chiellini's acceptance of the challenge and renewed vision and passion to create a company based on established principles of quality and sound business practices became a reality. The company's first full-time employee, Mark Almeda, hired at Lawncombers in 1995, shared the company's vision and passion for growth. Almeda became Chiellini's business partner and now serves as vice president of ASI. He remains today an integral leader in the business, directing and leading the company's Operations Division.

Today, ASI remains a company dedicated to its clients and employees. All employees at ASI become part of our history, tradition, and culture. Continued success of the company depends on each employee embracing the principles of teamwork, always providing quality services, and remaining focused on total customer satisfaction. Our employees also commit to personal growth through professional and technical skills training. In the highly competitive world of commercial landscaping, maintaining a knowledgeable and skilled work force is critical to ASI's ongoing success and commitment to our clients.

Leadership Team Biographies

Joseph A. Chiellini, President/CEO – Joe built the company in 1993; in its beginnings as a small two-person residential lawn care service to where we are today. Under his leadership and vision, ASI employs 180 individuals, maintains a commercial fleet with state-of-the-art equipment and technology. Joe and ASI have received many awards, recognitions and commendations over the years. Many as a result of maintaining high standards of customer care from several local associations, including Associate Member of the Year 2007, 2008, 2009 and Company of the Year 2008. Other awards are granted by the many charities and youth sports teams supported by Joe on behalf of ASI.

In addition to overseeing ASI, Joe served for twenty-eight-years as an employee of Hillsborough County Fire and Rescue. He retired from the department as a Captain. He is also the originator and President of the Krewe of the Knights of St. John, a non-for-profit organization benefiting several local charities. He has recently developed a passion for consulting small business owners and shares with them his ideas and philosophy regarding strategic planning and customer service. Joe was also recently recognized as a Trailblazer by the National Association of Landscape Professionals for his contributions to the industry.

In October 2011, Joe was the featured "Hometown Hero" by the Tampa affiliate of Fox TV. He has also served on the 2011-2012 Advisory Council of Aileron, a professional consulting group that provides professional development and assistance to business owners and executives.

Mark A. Almeda, VP/COO/Director of Operations - Mark began his association with ASI in 1995 as the first full time employee of the company's predecessor, Lawncombers USA. His first job was a crew member going from job to job, maintaining lawns and landscapes by mowing, weeding, fertilizing and adjusting irrigation systems. He quickly advanced to the position of Foreman, where he assumed a management role, assigning and supervising workers and overseeing the quality of the work. Mark's management style and attention to detail did not go unnoticed and in 2005 he became a partner and vice president of the company. Mark has held this position to this day. Throughout his 20 plus years of experience, Mark has gained and

shared his knowledge and expertise with hundreds of ASI team members. He and Joe Chiellini have managed to grow the company despite the unpredictable nature and growing competition of the landscape industry. Mark strongly supports both personal and professional development for himself and ASI team members. He has participated in numerous management and business-related classes and training sessions and readily applies the lessons to his management role within the company. Mark holds the company's horticulture license and continually attends continuing education classes to maintain the most current industry standards. As the Vice President of Operations, Mark controls all aspects of the division, including the crews, fleet and equipment purchases, contracts, and assists in sales. He regularly conducts personal visits with company clients to ensure satisfaction and quality.

Eric Rothell, Director of Irrigation – Eric graduated from the University of Tennessee-Knoxville in 1997 where he received his B.S. in Environmental Science. He began his career as an Irrigation Technician following graduation and immediately knew that this was his passion. During his 20-year career he has held many roles such as Senior Account Manager, Market Irrigation Manager, Regional Irrigation Advisor, and Branch Manager. During this time, he also gained numerous irrigation industry certifications through the Irrigation Association including Certified Irrigation Technician, Contractor, Designer, and Auditor and he also serves as a corporate irrigation trainer. As our Director of Irrigation, Eric manages irrigation technicians across the multiple markets we currently service educating them with the most up to date irrigation knowledge in the industry.

Joe Amarosa, Director of Maintenance – Joseph currently supervises landscape maintenance operations throughout the Tampa market and has been a key member of the ASI team. Over this time Joseph has been involved in maintenance, renovation, design, installation, irrigation management, and tree care on all of his properties.

In the 10 years that Joseph has been in the Commercial Landscape Management industry, he has gained insurmountable knowledge of the landscape industry. Joseph hold the Florida Certified Horticulture Profession Certification as well as Best Management Practice Certification. Joseph's primary focuses are customer service, job quality, and continual education of his team on the ever-changing landscape industry. Being proactive, he will schedule work effectively and monitor crew productivity while keeping the property, visitors, and ASI team members safe while we are on site. Joseph will be on site regularly and will schedule site walks to promote proactive communication. He will be responsible for developing weekly schedules for the maintenance teams, and all support services such as irrigation, horticultural, and arbor care required to keep your property looking the best.

Key Personnel

ASI LANDSCAPE MANAGEMENT

The selected crew to maintain Carlton Lakes. has the skills and experience necessary to meet your specific needs and expectations. Meet your team:

TEAM MEMBER	JOB TITLE	JOB RESPONSIBILITY
Joe Amarosa	Branch Manager	• Accountable for your complete satisfaction • Maintains schedule • Ensures compliance to job specs and quality • Manages crews • Interfaces with on-site contact
Joe Picardo	Client Relations Manager	• Accountable for your complete satisfaction • Maintains schedule • Ensures compliance to job specs and quality • Manages crews • Interfaces with on-site contact
Daniel Myers	Production Manager	• Schedules workload for crew • Ensure readiness of workers, tools and materials • Maintains safe working conditions • Trains field personnel • Assists w/large pruning jobs, chemical and irrigation applications • Helps identify problem areas
TBD	Foreman	• Manages hourly activities of crews • Operates all small walk behind mowers • Helps crew operate hand-held machines • Performs large pruning, trimming and detail jobs • Daily clean up
Johnny Rodriquez	Irrigation Technician	• Schedules weekly irrigation inspections and schedules approved repairs • Adjusts, repairs and troubleshoots problems • Assists as needed
Bryant McCombs	Pest Control Specialist	• Applies insecticides, herbicides, fungicides and other chemicals, safely and in accordance with industry standards • Proactively inspects for all pest pressure.

Licenses and Professional Associations

The following are the list of licenses/certifications/subcontractors currently held by ASI Landscape Management's professional staff as well as professional associations and organizations of which we are an active member.

ASI LANDSCAPE MANAGEMENT LICENSES AND REGISTRATIONS

- Occupational License – Florida, Hillsborough County No. 96169
- Pest Control License – Florida, No. JB135024
- Pest Control Operator – Florida, No. JF184897
- License as a Dealer in Agricultural Products – Florida, No. 116260-1
- Nursery Stock Dealer Certificate of Registration – Florida, No. 47237971
- Certified Arborist License – Florida, No. FL0710A
- FDOT Intermediate Maintenance of Traffic Certification – Qualified 6/4/13
- Pinellas County BMP Certification – No. 013
- State of Florida Irrigation – License No. I-CFCO24523

PROFESSIONAL ASSOCIATIONS

- NALP – National Association of Landscape Professionals
- Florida Turfgrass Association
- FNGLA - Florida Nursery, Growers and Landscape Association
- FIS – Florida Irrigation Society
- BAAA – Bay Area Apartment Association
- FAA – Florida Apartment Association
- NAA - National Apartment Association
- BOMA – Building Owners and Managers Association
- CAI – Community Associations Institute
- Greater Tampa Bay Chamber of Commerce
- CFHLA – Central Florida Hotel & Lodging Association
- AAGO – Apartment Association of Greater Orlando

Past Record of Similar Scope

The following represents several key maintenance contracts held in the past that show our experience in providing services of a similar scope. Many of these projects have been serviced by ASI for multiple years and provide an example of the level of quality and customer service provided.

Del Web HOA *(Homeowners Association)* **Service Dates:** 2018 - Ongoing

Service Provided: Full-service landscape maintenance including monthly irrigation and horticultural services. Annuals, mulch and palm trimming are also included as additional services as a part of this contract.

Contact: Mr. Brady Lefere
Community Manager
Pulte Group
(813) 964-5165
Brady.lefere@Pultegroup.com

Milestone Management *(Multi-family Housing Portfolio)* **Service Dates:** 2013 - Ongoing

Service Provided: Full-service landscape maintenance including monthly irrigation and horticultural services provided to a portfolio of apartment communities. Additional services including palm and hardwood trimming, annuals and irrigation repairs and modifications provided in addition to the contract value. Landscape design services and the installation of new plant materials also provided at several communities in addition to the contract value.

Contact: Mrs. Lori Odell
Regional Director
Milestone Property Management
(813) 299-3055
lorio@milestone-mgt.com

Calabay Parc at Tower Lake *(Homeowners Association)* **Service Dates:** 2018 – Ongoing

Service Provided: Full-service landscape maintenance including monthly irrigation and horticultural services provided to a maintenance free community. Additional services including palm and hardwood trimming, annuals and irrigation repairs and modifications provided in addition to the contract value. Landscape design services and the installation of new plant materials also provided in addition to the contract value.

Contact: Mrs. Jennifer Conklin
Licensed Community Association Manager
Highland Community Management
(863) 940-2863
j.conklin@hcmanagement.org

Liberty Property Trust *(Class A Industrial)* **Service Dates:** 2017 – Ongoing

Service Provided: Full-service landscape maintenance including monthly irrigation and horticultural services provided to a portfolio of Class A Industrial Sites. Additional services including palm and hardwood trimming, annuals and irrigation repairs and modifications provided in addition to the contract value. Landscape design services and the installation of new plant materials also provided at several sites in addition to the contract value.

Contact: Mrs. Nancy Goldenberg
Regional Property Manager
Liberty Property Trust
(407) 858-4450
ngoldenberg@libertyproperty.com

Jesuit High School *(Class A Campus)* **Service Dates:** 2017 - Ongoing

Service Provided: Full-service landscape maintenance including monthly irrigation and horticultural services. Annuals, mulch and palm trimming are also included as additional services as a part of this contract. Additionally, we have provided landscape design services and the installation of new plant materials not included as a part of the monthly contract value.

Contact: Mr. Chris Lucas
Director of Institutional Planning
Jesuit High School
813-877-5344 Ext 711
clucas@jesuittampa.org

Here are a few other notable properties we maintain and can provide contacts for if needed:

- Amalie Arena
- Power Design
- Southern Plantation
- Esplanade at Starkey Ranch

LETTER OF RECOMMENDATION
AMERISCAPE SERVICES INC.

January 18, 2019

To Whom It May Concern,

As the Director of Institutional Planning, I am responsible for overseeing all construction projects, campus operations, and facility maintenance for Jesuit High School in Tampa. I am writing this letter to recommend Ameriscape Services (ASI) for landscape maintenance services.

ASI was awarded our annual landscape maintenance contract in June of 2018 after we had struggled for several years with previous maintenance companies. Our campus is almost 40 acres with numerous different classroom buildings, athletics facilities, administration building, chapel, and a large Jesuit residence. The campus is seemingly always in motion with students, teachers, and alumni moving about, which creates a challenge for a service like landscape maintenance to perform their task.

ASI came prepared with a plan to navigate these challenges without disruption to ordinary campus life, and we have been very pleased with the execution of the plan. We are in constant coordination with the Account Service Manager (ASM) who takes ownership of the responsibilities of the landscape maintenance and their crew. The ASM inspects campus every week and identifies "hot spots" that need attention for his crew to focus on during the visit.

We have a high level of expectations for the beautification of our campus, and landscape maintenance plays a huge role in successfully meeting these expectations. I am pleased to say that ASI has outperformed our expectations in this regard. Within the first six months, we have seen a noticeable improvement in the health and maintenance of our campus landscaping as a whole. They have been quick to propose solutions to problem areas that cannot simply be resolved through additional maintenance. Their overall attention to detail is most impressive and I am confident that their hard work puts the health of our campus landscaping on an upward trajectory.

ASI provides me with a level of confidence that I have not had with any of our previous landscape maintenance companies. Their proactive approach and diligence in the details alleviates hours of time that we had previously allocated to managing this service. For all of these reasons, I am confident that ASI would be a great addition to your team of service contractors.

Please feel free to call me if I can answer any questions or provide any further information regarding ASI and the wonderful job they do for us.

Sincerely,

Chris Lucas
Director of Institutional Planning

JESUIT HIGH SCHOOL 4701 N. Himes Ave. Tampa, FL 33614 T (813) 877-5344 www.jesuittampa.org

Equipment

The following is a list of equipment owned by ASI that may be used in accordance with the scope of services at Carlton Lakes.

Type of Equipment	Quantity Available
Light duty trucks	30
Super Duty trucks	30
F-450 or larger trucks	6
Maintenance trailers (open and enclosed)	25
Heavy duty trailer	8
Tow behind turbine blower	1
Irrigation trucks	8
Spray trucks	3
Spray Cart	2
Additional utility carts	2
Ride-on spreader	3
4x4 tree lift	2
Stump grinder	1
Batwing mower	1
72” mower	6
60” riding mower	11
Walk behind mower	30
Ditch Witch trencher	2
Skid steers	4
Field Equipment	
Edgers	400 pieces total
Line Trimmers	
Blowers	
Gas shears	
Back pack sprayers	

Hurricane Response Plan

June 1st marks the start to hurricane season with it lasting through the month of November. With uncertainties in the climate, predicting the season can be challenging and therefore, it is always best to be prepared in the event that a storm should make landfall in our area.

To help Carlton Lakes prepare, our management team will be proactively evaluating your property for potential landscape issues that can be prevented prior to a storm. In addition to preparedness we will ensure that multiple emergency contacts have been provided to the board and staff. Communication can be difficult following major storms so this will help maximize efficiency in relief efforts.

Following a storm, and once it's determined safe to do so, we will dispatch our regular crew to the property for clean-up efforts. Our team will work through the property based on the following priorities:

1) Clearing of debris blocking vehicle access to ensure emergency personnel can access your property.

2) Clearing debris from structures that may pose an immediate risk or danger.

3) Replanting of any plant material that may have a chance to survive if replanted.

4) Trimming and removal of hazardous damaged limbs that remain in trees.

Any work that our on-site crew is incapable of taking care of (large tree limb failure, uprooted trees, debris caught in canopies etc.) will be billed at a rate of $125 per hour. This price **includes** the use of all necessary specialty equipment such as lift, chipper, grapple truck, skid steer & stump grinder.

Once the above priorities have been met, we will continue to work diligently to clean up the remainder of site of smaller less hazardous debris. This will include removal of tree limbs and landscape debris left on the ground from any initial efforts. We will also provide options for restoration of all damaged landscaping should this be necessary throughout the community. Regular service/mowing of the site will resume once the clean-up has been complete and the moisture levels in the turf have reduced enough so that our equipment will not cause additional damage.

We encourage you to evaluate your emergency plans to ensure that you and your staff are prepared in the event a damaging storm makes landfall. If we may answer any questions or concerns you may have regarding our plan and your landscaping please let us know.

Service Proposal

Carlton Lakes CDD
2005 Pan Am Cr. #300
Tampa, FL 33607

Date: April 21, 2020

Attn: Nicole Hicks
Phone: (813) 397-5120
Email: nicole.hicks@merituscorp.com

ASI Representative
Michael Moseley – Regional Business Developer
Cell: 813.299.5339
Email: mmoseley@ameriscapeusa.com

CONTRACT SERVICES	Monthly Price	Yearly
Base Maintenance Services	$ 10,200.00	$ 122,400.00
Horticulture Services	$ 2,110.00	$ 25,320.00
Irrigation Services	$ 735.00	$ 8,820.00
Annual Flower Program Includes 200 annuals 4 times a year	$ 150.00	$ 1,800.00
Mulch Program Includes 420 yards of mulch	$ 1,750.00	$ 21,000.00
Palm Pruning	$ 185.00	$ 2,220.00
Total Contracted Services	$ 15,130.00	$ 181,560.00

EXTRA SERVICES	QTY	Unit Cost	Per Freq	# of Freq	Total
Annual Flower Program - (4") units	0	$ 2.25	$ -	4	$ -
Mulch Program - Cocoa Brown	0	$ 50.00	$ -	1	$ -
Palm Pruning - General	0	$ 35.00	$ -	1	$ -
Palm Pruning - Tall	0	$ 65.00	$ -	1	$ -

General Contract Terms & SOS

A. The term of this contract:

From: June 1st, 2020 To: May 31st, 2022

B. The Client agrees to pay Contractor the total price of all seasonal services as compensation for the complete performance of the terms and conditions of this contract.

C. The Client shall be invoiced on the first (1st) of each month of service and payment shall be due by the last day of that month.

D. Both parties reserve the right to cancel this agreement at any time with thirty (30) days written notice.

SECTION A: SCOPE OF SERVICES

The following represents ASI Landscape Management standard scope of services. ASI Landscape Management will provide fifty-two (52) visits per year with detail work performed when full-scale mowing is not required. Services negotiated as well as any additional services in addition to those described below will be detailed in the included Service Proposal pricing summary.

Part 1: General Services

A. Mowing: All turf areas will be mowed weekly from April 1st to September 30th. From October 1st through March 31st turf will be mowed as needed unless specified otherwise in this contract. In the event weather or environmental conditions dictate a skipping of scheduled mowing service the mow event will be rescheduled when conditions allow or other services may be performed in lieu of mowing services.

All mowing by the Contractor will use a (rotary/mulching) mower. Mower blades will be sharp at all times to provide a high-quality cut and minimize disease. Mowing typically removes not more than 1/3 of the leaf blades. Clippings will be left on the lawn as long as no readily visible clumps remain on the grass surface 24 hours after mowing. Otherwise, clippings will be collected and removed by the contractor. The Contractor will clean all clippings from sidewalks, curbs, and roadways after mowing and/or edging.

Note: Mono-filament line trimmers will not be used around trees and shrubs where injury to the bark of plants could occur.

B. Edging: *Hard edging* of all sidewalks, fence lines, driveways, parking lots and other surfaced areas bordered by grass will be performed in conjunction with mowing services. Buildings, plant and tree rings and plant beds will be *soft edged* every other mowing.

C. Pruning/Trimming: Shrubs will be pruned as needed with appropriate equipment to maintain proper informal shape, fullness, and bloom. The Contractor will remove all litter. Trees and palms will be serviced up to twelve (12) feet in height from the ground and will be performed on a regular basis as needed during detail services. Branches pruned will not exceed two (2) inches in diameter.

No trees, under utility lines will be pruned and no pruning will be done during or immediately following growth flushes. Branches will be pruned just outside the brand collar. Pruning paint will not be applied. Sucker growth will be removed by hand from the base of trees. No herbicides will be used for this purpose.

Turf will be line trimmed in areas that are not accessible with a mower or where there are obstacles.

D. Weed Control: Weeds may be spot treated if possible or removed by hand or mechanical means. Weeds in paved surfaces will be removed by string trimmer. Weed control in plant beds, tree rings and hard surfaces will be addressed every 3-4 weeks during each detail cycle and will be removed via chemical application, mechanically or by hand based on weed size and location.

Part 2: Horticultural Services

A. Fertilization: St. Augustine, Bermuda and Zoysia areas will be fertilized with two to five pounds Nitrogen annually according to specifications and in accordance with all federal, state, and local regulations unless otherwise proposed. Bahia areas will be excluded from any fertilization programs unless otherwise negotiated. Pond banks are excluded from fertilization program. All complete fertilizers shall contain 30% - 75% of the nitrogen in a slow or controlled release form. The ratio of nitrogen to potash will be 1:1 or 2:1 for complete fertilizer formulations. They shall also contain magnesium and micronutrients (i.e. manganese, iron, zinc, copper, etc.). Fertilizers will be applied at a rate of one (1) pound of nitrogen per 1000 square feet or equivalent.

Ornamental shrubs and trees will be fertilized twice annually. Mature palms should receive a complete, granular fertilizer formulated for palms at a rate of one (1) pound each application. Palms fewer than eight feet in height should receive 2-5 pounds two times per year. All fertilizers should contain nitrogen and potassium and at least 30% of both elements should be available in a slow release form. The fertilizer should also contain additional magnesium and a complete micronutrient amendment. All fertilization will be done following BMP's and according to any specifications and regulations.

B. Pest Control: Lawn and landscaping areas will be monitored during each service call and spot treatments will be performed as necessary to control pests. Post-emergent weed control will be applied annually in the winter months. Use of pre-emergent weed control can be provided at an additional cost and requires written Client approval unless specified in this contract. Imported pests, including fire ants, can be treated under a separate proposal at an additional cost.

Upon confirmation of a specific problem requiring treatment, pesticides will be applied following the University of Florida, IFAS recommendations using least-toxic Integrated Pest Management (I.P.M.) procedures. This includes weed and feed formulations. Records will be kept on pests identified and treatment(s) rendered for control. Pesticide applications will be made in accordance with the rules and regulations governing the use of pesticides in Florida.

The Contractor also practices Integrated Pest Management (I.P.M.) to control insects, diseases and weeds on and around perennials, ground covers, shrubs and vines. Trees taller than twelve (12) feet on average may require additional specialty treatments at an additional cost to the Client.

Part 3: Water Management Services (Not Applicable To This Contract)

ASI Landscape Management uses SmartLink cloud-based, smart control systems by Weathermatic to deliver the highest service levels by efficiently managing water and money, beautifying and protecting landscapes, complying with local water restrictions to avoid fines, and streamlining the inspection and repair process (see informational brochure).

Note: This service is provided via separate written authorization unless negotiated to be included within the monthly contract fees.

A. Smart Irrigation Control System Upgrade: The irrigation control "timers" currently in use will be upgraded to a cloud-based SmartLink irrigation control system incorporating the following equipment components:

I. Smart controller – a modular control system to upgrade any existing irrigation timer includes inputs for the type of sprinklers, plants, soil, and slope for each zone to drive the automated scheduling engine when used with the on-site weather station to align the water application to the needs of the landscape
II. On-site weather station – a wireless device that provides microclimate specific, hyperlocal weather inputs for temperature, relative humidity, and rainfall
III. Aircard – a cellular communication device that enables ASI Landscape Management to access the control system remotely using the SmartLink software and mobile app for programming changes and emergency shut down while also generating system alerts to address system issues in advance of normal site visits and irrigation inspections.
IV. The SmartLink system retail pricing is an average of $5,000 per control system with installation and commissioning, totalling $15,000 for 3 control systems on the property.
V. ASI Landscape Management is offering the control system for no cost as part of this landscape contract to reflect the ASI Landscape Management investment in the success of the relationship and enable the delivery of the highest service levels.

B. Irrigation Systems: If present, all irrigation components and zones in the system will be inspected monthly and zone times will be reset according to seasonal changes. Each zone will be re-calibrated annually. Calibration of irrigation zones will follow Cooperative Extension Service recommendations. All heads will be checked during each monthly inspection for proper operation, coverage and adjusted accordingly.

During weekly maintenance checks, the Contractor will note any symptoms of inadequate or excessive irrigation, drainage problems, etc., and report such to the Client. Repairs or system service beyond that included in the contract will be performed at an additional charge and require written Client approval. A "not to exceed" repair contingency may be negotiated for quicker repair or service turnaround and ease of administration.

SECTION B: ADDITIONAL SERVICES

Work performed under this category, if not negotiated and included in this contract, will be performed and charged using time and material basis. Estimates for proposed work will be discussed with the Client for approval before any work will begin.

Part 1: Additional Options

A. Bedding Plants: If included in this contract, the replacement of existing annuals shall be done four (4) times per year or as otherwise negotiated. The Contractor will apply fertilizer to annuals/bedding plants monthly, at a rate of 1/2 pound of nitrogen per 1,000 square feet of the area every two (2) weeks or a slow release fertilizer such as Osmocote or Nutricote (3-4 month release) shall be incorporated in the bed at planting. The Contractor will be responsible for weed control by hand or mechanical means, no

herbicides will be used in annual beds. Pest control will follow I.P.M. principals. Annuals that are included as a part of this contract will be of standard variety; premium annuals are available at an additional charge. Annuals in addition to, or not included in this contract, will be provided upon Client approval.

B. Mulch: If included in this contract, all mulched areas shall be replenished once annually or as otherwise negotiated. The material consists of cypress, pine bark, recycled, etc. Blowing and clean-up are included.

C. Palm Trimming: If included in this contract, palms in excess of twelve (12) feet, on average, will be trimmed once annually or as otherwise negotiated to ensure a proper and appealing appearance.

Part 2: Additional Services

A. Other Available Services: Examples of additional services available but not included unless otherwise negotiated are as follows:

- Preventative fire ant control, turf fungicide applications & various tree injections
- Seasonal Leaf Removal
- Landscape additions and renovations
- Landscape Lighting
- Plant replacement not attributed to Contractor negligence
- Turf/Sod replacement
- Repairs & modifications to the irrigation system
- Trimming of palms and trees in excess of twelve (12) feet in height.

SECTION C: GENERAL TERMS AND CONDITIONS

Part 1: Contractor's Responsibility

The Contractor shall recognize and perform in accordance with written terms, written specifications and designs, contained or referred herein. The Contractor reserves the right to renegotiate or amend the contract when price or scope of work is affected by changes to any local, state, or federal law, regulation or ordinance that goes into effect after the contract is signed.

A. Workforce: The Contractor shall assign a trained workforce with experience in the services being provided. The workforce will be presentable and identifiable at all times. All employees shall be competent and qualified, and U.S. citizens or legally authorized to work in the United States.

B. Landscape Materials: All materials shall conform to bid specifications. The Contractor will meet and comply with all Agricultural licensing and reporting requirements.

C. Licenses and Permits: The Contractor will maintain a Landscape Contractor's license, as required by state or local law, and will comply with all other license and permit requirements of the county, state and federal governments, as well as all other requirements of law.

D. Taxes: The Contractor agrees to pay taxes applicable for its work under this contract, including sales tax on material supplied where applicable.

E. Insurances: The Contractor agrees to maintain General Liability Insurance, Automotive Liability Insurance, Workers' Compensation Insurance, and any other insurance at the Contractor's discretion or required by law. In addition, the Contractor will require the same of any sub-contractors and will provide proof of such upon Client request. The Contractor is also responsible for obtaining any licenses and/or permits required by law for activities on the Client's property.

F. Liability: It is understood and agreed that the Contractor is not liable for any damage of any kind that is not caused by the negligence of the Contractor, its agents or employees, including but not limited to: death or decline of plant materials due to improper selection, placement, planting or maintenance before the time of this contract; damage due to improper irrigation components in existence at the time of contract execution; exposed cables/wires or sprinkler components/lines normally found below the surface of the lawn; flooding, storm or wind damage; disease or damage to lawns or landscape plants caused by excessive irrigation or lack of water due to inoperative components provided it reported these to the Client or irrigation restrictions imposed by Water Management District or civil authorities; damage caused by any item hidden in the landscape and not clearly guarded or marked; and damage due to vandalism.

The Contractor is liable for any damage due to the operation of equipment in performing the contract; complying with all laws pertaining to protected plant species such as the mangrove; damage to plant material due to improper horticulture practices; improper installation of irrigation system replacement components; and injury to non-target organisms in the application of pesticides.

G. Subcontracts: The Contractor reserves the right to hire qualified subcontractors to perform specialized functions or work requiring specialized equipment.

H. Invoicing: The Contractor will submit monthly service invoices for the amount set forth under the prices and terms included in this contract. Any services rendered, that are in addition to or beyond the scope of work required by this contract shall be separately billed.

Part 2: Client's Responsibility

A. Utility Usage: The Client shall allow the Contractor usage of utilities if needed.

B. Jobsite Access: The Client shall allow access to all parts of the job site where the Contractor is to perform work required by this contract or other related functions, during normal business hours and at other reasonable times, and in the case of after-hours emergencies.

C. Payment: For the convenience of the Client only, the monthly charge under this contract may be an average of the total charge for all work to be performed under the contract divided by the number of calendar months included in the payment period of the contract.

The Client shall review invoices submitted by the Contractor and payment shall be due within thirty (30) days following the date of the invoice and considered delinquent if not paid by that date. For work outside of the normal monthly contacted work, The Client shall review invoices submitted by the Contractor and payment shall be due upon completion of the work and receipt of invoice and considered delinquent if not paid accordingly. If payment has not been received within forty-five (45) days, the Contractor reserves the right to suspend services by giving written notice for nonpayment. Should services be suspended, monthly fees will not be prorated and services will resume once past-due payments are received.

D. Defects: The Client shall give the Contractor at least thirty (30) days to correct any problem or defect discovered in the performance of the work required under this contract. The Contractor may provide a deduction or offset at its discretion if defects are not correctable to the satisfaction of the Client.

Part 3: Other Terms

The Client and the Contractor respectively, bind themselves, their partners, successors, assignees and legal representative to the other party with respect to all covenants of this contract. Neither the Client nor the Contractor, their partners, successors, assignees and legal representative shall assign, transfer or terminate any interest in this contract without the written consent of the other.

Part 4: Renewal and Termination

This contract shall automatically renew for the same term as that set forth in Section A of the General Contract Terms above unless notice is given by Client to Contractor in writing of Client's intent to terminate this contract at least thirty (30) days prior to the termination of the current term. Additionally, this contract may be terminated by either party with or without cause, upon thirty (30) days written notice to the other party. This contract may be terminated by the Contractor for nonpayment by the Client, upon written notice as stated above. In the event this contract is terminated early by either party, the Contractor shall be entitled to recover those un-recovered costs incurred through the date of termination, including a reasonable amount of overhead and profit and any amount in excess of the monthly charges paid by the Client through the date of termination. As a condition precedent to Customer's right to terminate, Customer must tender payment in full for all Services performed through the date of termination. This includes any optional, additional or non-contractual service items that have been completed and performed in-full with said fees included within monthly base services invoice and having been spread out over 12 even monthly payments.

The term of the Smart Irrigation Control System Upgrade is the same as the ASI landscape maintenance contract. A termination fee of $199 per smart irrigation control system installed will apply in the event of contract cancellation within 12 months of the landscape maintenance contract effective date. Upon contract cancellation and payment of applicable termination fees, the property will retain the smart controller and on-site weather station, and ASI Landscape Management will remove and retain the Aircard cellular communication device used for remote monitoring.

Upon expiration of the stated contract period, and notwithstanding the automatic renewal of this contract, Contractor reserves the right to adjust the price of all seasonal services by Three percent (3%) effective on each anniversary date of the effective date.

Part 5: Legal

A. Controlling Law: The laws of Florida shall govern the validity, interpretation, construction, and performance of this contract. Each party hereby expressly consents to the personal jurisdiction, venue and convenience of, and the parties agree that any dispute arising hereunder will be heard in, the state and federal courts for the County of Hillsborough, Florida for any lawsuit arising from or related to this contract agreement. All references herein to the singular shall include the plural.

B. Legal Counsel: Each party has had (or has been advised to seek) independent legal counsel of their selection in the negotiation of this contract. Each party fully understands the facts and has been informed about their legal rights and obligations, including but not limited to the obligations of Florida Statutes regarding restrictive covenants and liquidated damages. Each party is signing this contract freely and voluntarily intending to be bound by it. Each party hereby knowingly, voluntarily and intentionally waives any right either may have to a trial by jury with respect to any litigation related to or arising out of, under or in conjunction with this contract or Contractor's employment with ASI Landscape Management.

C. **Attorney's Fees**: In the event, a dispute arises between the parties hereto and the suit is instituted, the prevailing party in such litigation shall be entitled to recover reasonable attorney fees and other costs and expenses from the non-prevailing party, whether incurred at the trial level or in any appellate proceeding. If the Contractor seeks counsel for nonpayment issues and an agreement is reached before a suit/trial those attorney fees can also be recovered.

EXECUTION OF SERVICE AGREEMENT

CONTRACTOR: ASI LANDSCAPE MANAGEMENT

Authorized By:

Print Name: _____ **Title: _____**

Signature: _____ **Signature Date: _____**

CLIENT: Carlton Lakes CDD

Authorized By:

Print Name: _____ **Title: _____**

Signature: _____ **Signature Date: _____**

A Brighter Outlook for your Landscape Services

BrightView Landscape Services

Prepared for:

Carlton Lakes CDD

April 29, 2020

April 29, 2020

Nicole Hicks

Meritus Corporation

1005 Pan Am Circle

Tampa, FL. 33607

Dear Nicole and Carlton Lakes CDD Board, ,

At BrightView, we believe your landscape is a strategic asset that can strengthen your brand and send the right message to your residents and potential residents. A well-maintained landscape makes an **optimal first impression** and serves as an important tool in meeting your objectives. Through our discussions we have discovered that the following key initiatives are paramount to your success:

The enclosed proposal was developed based on your feedback and will demonstrate how our experienced and skilled team will achieve your landscape goals and keep your property looking its best. Within the first 30 days on the job and throughout our service commitment, you will see a noticeable difference in the following areas that you indicated are high priority:

Communication with Confidence

We will improve the quality of your landscape maintenance and be proactive in our communication to you. BrightView's **Client Partnership Plan** provides the foundation to exceed customer expectations while understanding your needs and priorities. Your Joey Shears will continually engage with you to understand the opportunities and challenges that naturally occur over the lifetime of a partnership.

Improve Your Operating Budget

BrightView is a strategic partner who provides proactive solutions that enhance **operational savings**, year-round aesthetics, and drives value, aiding in achieving your business goals. We collaborate with you to **optimize your landscape dollars** using our established production processes, sound horticultural practices, and creative solutions that minimize operating costs over the long-term. You will benefit from clear budgets - with no surprises - as we continually manage both fixed and variable costs allowing you to anticipate and allocate your budget dollars.

Reduce Liability and Safety Risk

As an organization committed to constant improvement, we actively work to continue developing a **best-in-class Safety Management System** that results in zero injuries to our team members and injury rates well below the national industry average. We have safety managers assigned to every branch office and take pride in conducting our business operations in a manner that helps to ensure the safety and well-

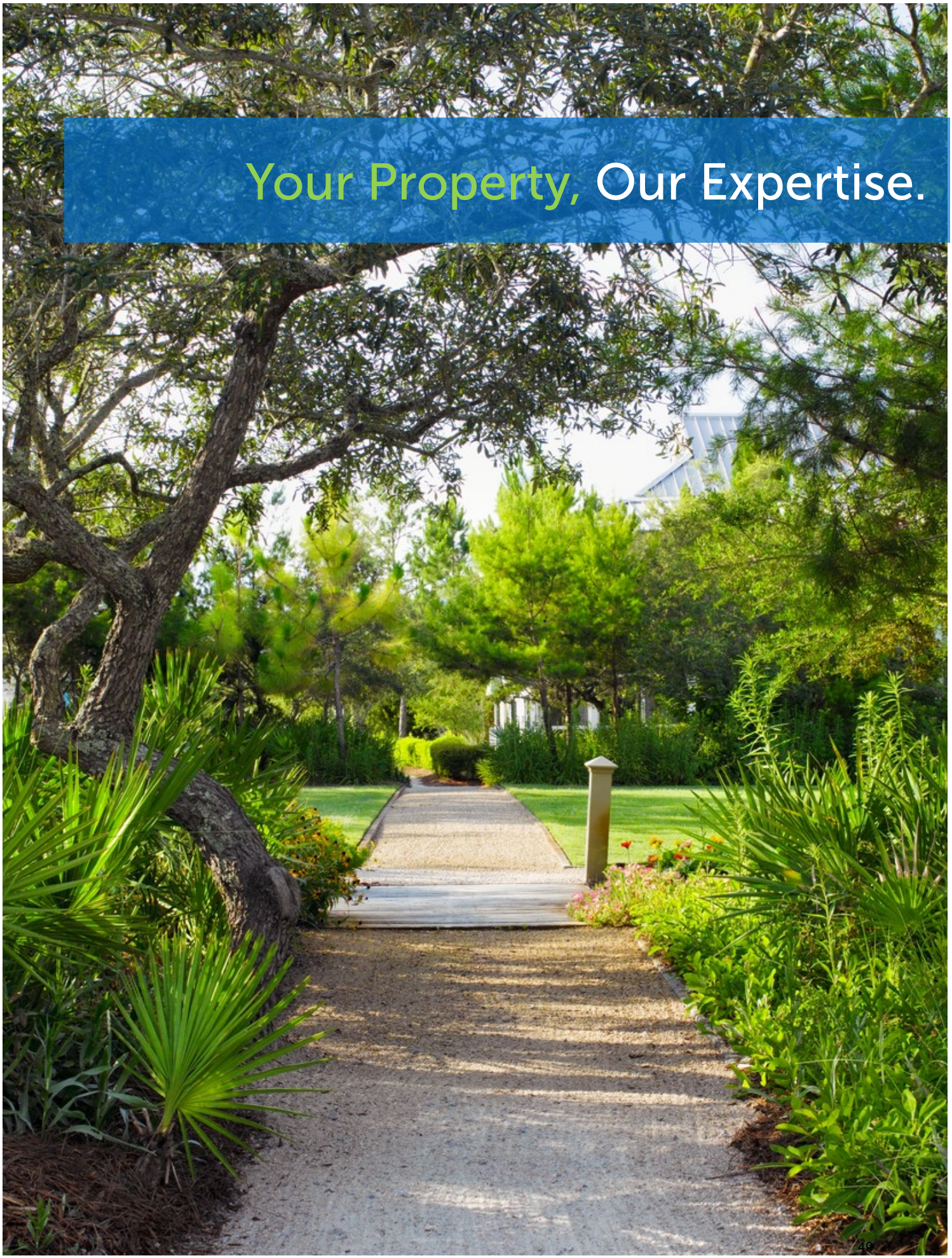
being of our teams and the communities in which we operate. This structured and disciplined safety excellence initiative protects and fosters a safe environment - we will make sure every inch of your property is safe and easily navigable – walkways, parking areas, and entrances, no matter the weather.

Carlton Lakes CDD deserves a landscape management partner that will deliver on your key objectives without compromise. BrightView's **experience**, **depth of knowledge, resources**, and **dedicated team members** make that possible.

I will follow up with you to address any questions that you may have on our services.

Regards,

Kyle DuBois
Cell: 813-476-0304
Email: kyle.dubois@brightview.com


Your Property, Our Expertise.

Carlton Lakes Landscape Calendar

BrightView

Every landscape requires special attention, pruning, watering, fertilization and other factors. Your dedicated team as created a unique maintenance plan to help keep your property looking its best year round.

BrightView Landscape Services

FUNCTION FREQUENCY CHART

Turf Maintenance	As Needed	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC	TOTAL
Turf- Mowing		2	2	3	4	5	4	5	5	5	3	2	2	42
Hard Edge		2	2	3	4	5	4	5	5	5	3	2	2	42
Bed Edge		2	1	1	2	3	2	3	3	2	2	1	2	24
Pre-emergent Weed Control	X			1							1			2
Post-emergent Weed Control	X			1				1			1			3
St. Augustine Fert		4x per year												4
Disease Control	X													
Insect Control	X													

Shrub & Bed Maintenance	As Needed	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
Trim		1	1	1	1	1	1	1	1	1	1	1	1	12
Weed		1	1	1	1	1	1	1	1	1	1	1	1	12
Pre-emergent Weed Control				1			1							2
Post-emergent Weed Control		2	2	2	4	5	4	5	5	5	4	2	2	42
Disease Control	X													

Misc. Maintenance	As Needed	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
Policing & Debris Clean-up		2	2	3	4	5	4	5	5	5	3	2	2	42

Irrigation Service	As Needed	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
Check & Adjust		1	1	1	1	1	1	1	1	1	1	1	1	12

Additional Available Services

Seasonal Color (900 Plants)	As Needed	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
Install seasonal flowers				1			1			1			1	4
Bed Preparation				1			1			1			1	4
Fertilization				1		1	**B/O**	**B/O**	**B/O**	**B/O**	1		1	4

Mulch	As Needed	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
Installation			1											1

Tree Care	As Needed	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
Palm Pruning														

Landscape Calendar

Timing is critical to the health and longevity of your plant material. From trimming to fertilization, we map out our plan in advance to ensure health landscape.

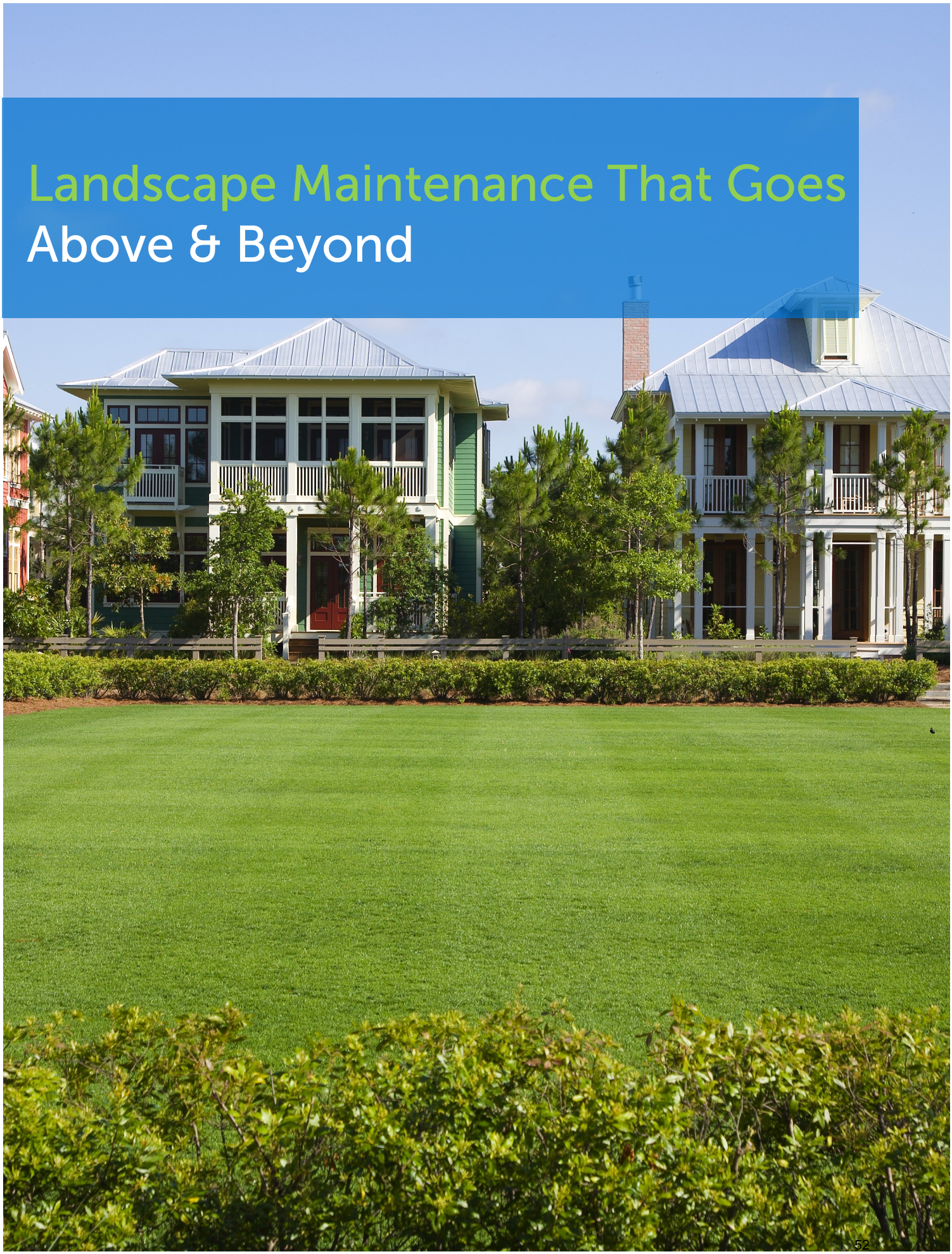
St Augustine Turf Standard

Trt	Application Dates	Type	Maintenance Description (unit of measure)
1	Feb to Mar	G	Fertilization with Preemergence (Standard)
2	April 15 - May 30	G	Fertilization (Standard)
3	May to June	L	Chinchbug Control
4	Sept 15 - Oct 31	G	Fertilization (Standard)
Alternate Product Options			
5	as needed	G	Maintenance Fertilization
6	as needed	G	Fertilizer with Enhanced Slow Release
7	as needed	G	Fertilizer with Chinchbug Control
8	as needed	G	Startup/Rescue Fertilization
9	as needed	G	Phosphorus Deficient Soils Fertilization
IPM and Misc Applications			
A	As needed	L	Chinchbug Control - Spot Treatment
B	Dec/Jan	L	Winter broadleaf weed control

Ornamental Program

Trt	Application Dates	Type	Maintenance Description (unit of measure)
1	April/May	G	Fertilization of Ornamental Beds
2	Nov/Dec	G	Fertilization of Ornamental Beds
Alternate Product Options			
4	As needed	G	Fertilization with Preemergence Weed Control
4	As needed	G	Fertilization of High Value Palms
IPM and Misc Applications			
A	As needed	L	Insect and Scale Control

Landscape Maintenance That Goes Above & Beyond



BrightView Standards of Excellence

The importance of good curb appeal cannot be underestimated. That's why we're relentless in our high standards and dedication to delivering an impactful first impression. Our team members participate in strict quality standards and continuous improvement training to ensure the service you receive is impeccable, efficient, and always excellent.

BrightView's proprietary 7 Standards of Excellence promote best practices and standards among the most common areas of landscape maintenance, enabling us to develop a cohesive, consistent strategy for your site. With a shared commitment and a focus on these standards, we will improve the quality of your landscape maintenance.

1. Site Cleanliness
2. Weed Free
3. Green Turf
4. Crisp Edge Beds
5. Spectacular Flowers
6. Uniformly Mulched Beds
7. Neatly Pruned Trees & Shrubs

Goals of Initial Site Meeting

- Clearly establish expectations using contract specifications and knowledge of site management
- Establish a communication process (meetings, reports, etc.)
- Present schedule of operations to Client
- Identify ALL special situations, issues, areas & processes
- Clearly establish a base safety process and site specific processes
- Document a process for out of scope work (P.O., sign-off, billing)
- Share emergency call process
- Set short-term improvement goals
- Benchmark existing site status, conditions and opportunities for improvements

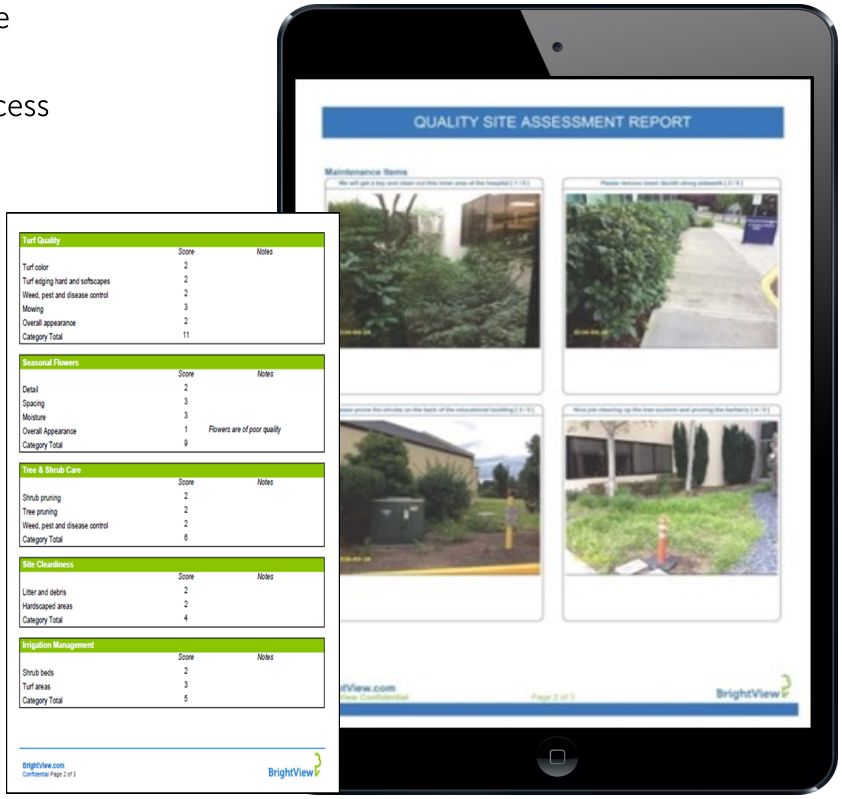
Proactive Communication Protocols
Drive Accountability

Successful partnerships are built on a platform of effective communication. BrightView's Client Partnership Plan provides the foundation to exceed customer expectations while understanding your needs and priorities.

Your Account Manager will continually engage with you to understand the opportunities and challenges that naturally occur over the lifetime of a partnership. The intent is to gain a deeper understanding of your business, future plans, budget forecasting, and a strategy as to how we can deliver more value.

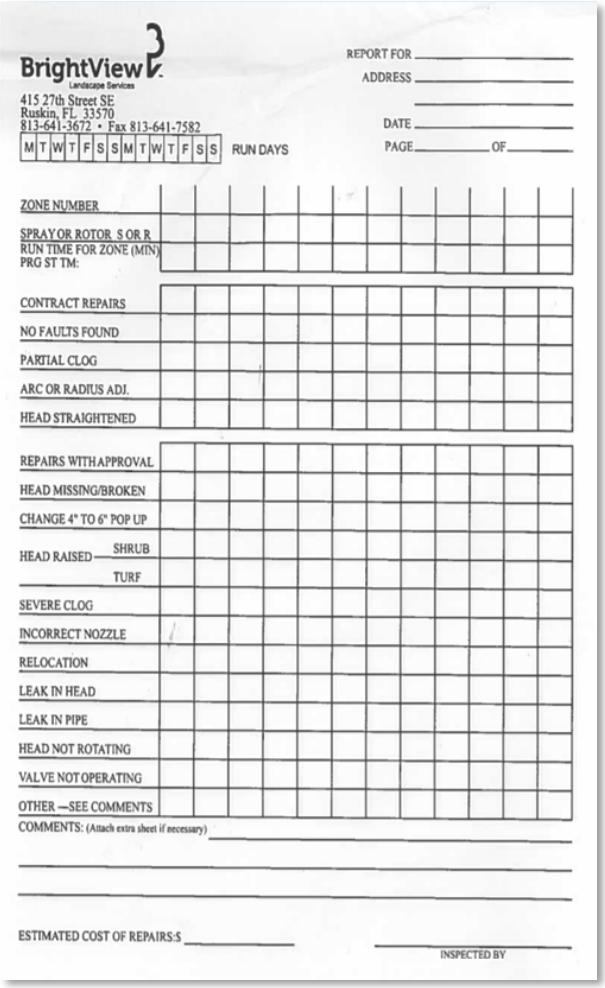
We begin our partnership with a promise: quality landscape and client centric customer service. BrightView's formal **Quality Site Assessments** ensure we keep that promise. Our QSAs deliver:

- Well defined expectations for landscape quality
- A forum for you to share feedback
- Progress updates on our work
- Time set aside to discuss opportunities
- A stronger partnership with you in the management of your landscape
- Accountability that ensures your success



Irrigation Reports

Regular inspections and system monitoring will be a part of our proactive approach and communication methods to keep your irrigation functioning properly and efficiently.



BrightView Landscape Services
415 27th Street SE
Ruskin, FL 33570
813-641-3672 • Fax 813-641-7582

M T W T F S S M T W T F S S RUN DAYS

REPORT FOR _____
ADDRESS _____
DATE _____
PAGE _____ OF _____

ZONE NUMBER												
SPRAY OR ROTOR S OR R												
RUN TIME FOR ZONE (MIN) PRG ST TM:												
CONTRACT REPAIRS												
NO FAULTS FOUND												
PARTIAL CLOG												
ARC OR RADIUS ADJ.												
HEAD STRAIGHTENED												
REPAIRS WITH APPROVAL												
HEAD MISSING/BROKEN												
CHANGE 4" TO 6" POP UP												
HEAD RAISED — SHRUB												
TURF												
SEVERE CLOG												
INCORRECT NOZZLE												
RELOCATION												
LEAK IN HEAD												
LEAK IN PIPE												
HEAD NOT ROTATING												
VALVE NOT OPERATING												
OTHER —SEE COMMENTS												

COMMENTS: (Attach extra sheet if necessary) _____

ESTIMATED COST OF REPAIRS:$ _____

_____ INSPECTED BY

Water Management Services

- Water Auditing
- Water Budgeting and Tracking
- EvapoTranspiration (ET) Based Scheduling
- Central System Installation and Management

High Efficiency Upgrade Equipment and Replacement Parts

- ET / Weather Based Controllers
- Soil Moisture Sensors
- Rain Sensors
- Matched Precipitation Sprinklers
- Flow Meters and Master Valves
- Rotory Nozzles
- Pressure Regulated Valves and Sprinklers

Water Saving Retrofits

- Drip Conversions
- Hydrozoning Design and Implementation

Business Reviews

We conduct business reviews to ensure alignment on individual site performance. The reviews keep you in the know, informing you of what we've done and what we're going to do, and also evaluate our performance and provide recommendations and guidance on future plans for your property.

Weekly Reports Provided

We utilize a simple, yet effective reporting tool to communicate on weekly services. The report below can be used by our Account Manager during weekly site visits to recap the priorities back to you.

Field Report

Crew Leader: _____

Client Fax: _____

Client Name: _____ Date: _____

Property Name: _____ Manager: _____

THE FOLLOWING SERVICES WERE PERFORMED:

Operation	Complete	Ongoing
POLICE SITE	☐	☐
MOW	☐	☐
BLOWING	☐	☐
WEED BEDS	☐	☐
EDGE BEDS	☐	☐
EDGE HARD LINES	☐	☐
SPOT PRUNE SHRUBS	☐	☐
MAJOR PRUNE SHRUBS	☐	☐
PRUNE GROUND COVERS	☐	☐
PRUNE TREES	☐	☐
FLOWER CARE	☐	☐
SPRAY INSECTICIDE	☐	☐
SPRAY HERBICIDE	☐	☐

Comments: _____

Client Signature: _____ Date: _____

Customer Satisfaction Surveys

We seek ongoing feedback from our clients using objective sources such as targeted telephone surveys or other outreach discussions in order to verify we are exceeding expectations.

Seamless Transitions Create Successful Partnerships

Success depends on a seamless transition, this sets the tone for the entire relationship and acts as a foundation for successful engagement. An ideal transition is smooth, cost effective and transparent.

At our initial kick-off meeting, we will confirm communication protocols, review the contract and scope of work along with a timeline on completion of key site initiatives. Moreover, we review our safety protocols, our QSA process and scheduling, and discuss pre-approval thresholds on emergency spending.

30

- **Monthly Review:** Client, Account Manager, Branch Manager and Business Developer
- Review agreed upon first month expectations, progress on key initiatives, and lessons learned
- Implement course corrections as may be needed
- Perform site QSA with client
- Confirm site maintenance plan (key site initiatives) for next 30 days

60

- **Monthly Review:** Client, Account Manager, Branch Manager and Business Developer
- Confirm scope alignment & expectations are being exceeded
- Review details on QSA and any carryover items
- Check progress and/or completion of key site initiatives
- Client Survey touch point

90

- **Business Review:** Client, Account Manager, Branch Manager and Business Developer
- Review *90-Day Follow-up Partnership Transition Guide*
- Review details on QSA and any carryover items
- Check progress and/or completion of key site initiatives

The Right Team On the Ground

We know success is built upon well trained and tenured team members providing outstanding quality and customer service. Every team member is required to complete our safety and operator training program which prepares your crew with the skills necessary to safely perform quality work to your satisfaction.

BrightView's support for your location will include the following team members:

BrightView Team Member	Service Provided
Joey Shears Account Manager	• Primary customer contact • Accountable for customer satisfaction • Ensures compliance to job specifications and quality
Dennis Upper Production Manager	• Manages crews and subcontractors • Ensure readiness of workers, tools, and materials • Maintains safe working conditions • Trains field personnel • Ensures delivery of job specifications and quality
Freddy Vasquez Crew Leader	• Ensures readiness of workers, tools and materials • Trains field personnel • Performs and leads job specifications on site
John Cornelius Branch Manager	• Ensures quality and efficient t landscape maintenance for clients • Consistently improves best practices within branch • Lead and support all branch personnel

Organizational Structure & Staffing Model

We spent a great deal of time and effort to inspect, walk and measure the entirety of the community Over the past several weeks we have developed an operational plan for a daily presence on property designed to merge efficiency with your expectations and the needs of the site.

Mow Crew

This crew will move through the site to complete all mowing operations on a weekly schedule Monday through Thursday. If additional help is needed due to inclement weather or events; Friday and/or Satur-day will be utilized to complete operations with additional crews as needed.

Detail & Pruning Crew

This crew will have a weekly schedule as noted in the Detail Schedule map. Their duties will include ornamental, shrub and tree care along with site policing, weed removal, and leaf removal.

Account Manager

Owner of Carlton Lakes CDD relationship and primary point of contact for Meritus and Carlton Lakes team. He will be responsible for scheduling and managing all operational activities, QSA's, communication with the Carlton Lakes staff and leader-ship. The Account Manager creates company mandated Quality Site Assessment or QSA for your site on a bi-monthly basis. This will serve as a snapshot of the conditions on site and a man-agement tool that helps both parties visually understand areas of concern or needs that can be tailored to be area specific.

Production Manager

This team member will be on site daily and the right hand of the Account Manager. This person will provide leadership and supervision to the field crews above along with directing daily operational movement to cover specific work orders communicated to us by Carlton Lakes' team and the Account Manager.

Ancillary Services:

There are several teams external to the Carlton Lakes; on site team that will handle a portion of the work load specific to their expertise. Tree Care outside of ground clearance will be handled by Tree Care Crews as scheduled. Seasonal color bed consultation, design, installation, and maintenance will be handled by our Seasonal Color Department.

Chemical applications for fertilization, insects, and specific weed control products will be handled by Spray Technician who use specialized equipment to move through the site in a more efficient manner. Improvements to the landscape that involve light construction will be performed by a separate team skilled in the area of landscape installation

Meet Your
Client Services Team (CST)

BrightView Landscape Services prides itself as a Learning Organization. Over the past 75+ years our Company has been a leading innovator in many of todays Best practices.

We have always provided a single point of contact to our Clients to streamline communication and to have accountability in service delivery. We will continue to maintain this best practice based on the success our clients have communicated back. In addition we are now providing our clients with a Client Service Team to better provide transparency in service delivery.

Here we have developed a team to best service each Client and below you will see how each one plays a role in successful client satisfaction:

Account Manager (AM)	**Focus on Client** • Develop Client Relationships • Renew client accounts • Proactively provide enhancement proposals • Communicate client needs to PM and support PM
Production Manager (PM)	**Focus on Execution of the Work** • Manage crews to execute the work • Hire, develop, evaluate, and retain crew members • Safety, quality, and efficiency • Reports to the AM • Communicate with AM to understand client needs
Ancillary Managers (EM/IM/SSM)	**Focus on Ancillary Work (Production & Client)** • Support and drive enhancement sales • Manage crews to execute ancillary work • Hire, develop, evaluate, and retain crew members • Safety, quality, and efficiency • Source and procure material

Meet Your
Client Services Team (CST)

Joey Shears

Account Manager

Experience

- 30 years in the Florida Green Industry
- Worked with the Sun City BrightView Team for 30 years

Certifications

- Certified State of Florida Green Industries Best Management Practice
- Florida Pest Application License
- Florida Certified landscape Technician

Dennis Upper

Production Manager

Experience

- 35 years in the Florida Green Industry
- Worked with the Sun City BrightView Team for 10 years

Certifications

- Certified State of Florida Green Industries Best Management Practice
- BrightView Production Systems Certified

Martin Padilla

Enhancement Manager

Experience

- 30 years in the Florida Green Industry
- Worked with the Sun City BrightView for 30 years

Certifications

- Certified State of Florida Green Industries Best Management Practice
- Florida Certified landscape Technician
- MOT Certification

Meet Your BrightView Senior Branch Manager

Your senior Branch Manager will be John Cornelius. John currently manages landscape maintenance business throughout the South County Area and has been a key member of the West Florida Team for 30 years. Over this time John has gained a broad insight into how BrightView can best serve you as he has served in several positions throughout the company including Supervisor, Operations Manager, Account Manager and Tree Care Manager

My focus is to work with your Account Manager to see that all your goals are met in maintaining your property. I visit properties periodically to review how we are doing in meeting our promises and your expectations. I will review with your Account Manager frequently and discuss our progress in these goals.

John Cornelius

Senior Branch Manager

Here are BrightView, we offer more than just mowing:

- Landscape Design and Maintenance
- Hardscapes
- Tree Care Services
- Irrigation
- ... And Much More

STATE OF FLORIDA
Department of Agriculture and Consumer Services
BUREAU OF ENTOMOLOGY & PEST CONTROL

Date: May 22, 2014 | File No. LF220209 | Expires: May 23, 2018

THE LTD COMMERCIAL FERTILIZER APPLICATOR HOLDER NAMED BELOW HAS REGISTERED UNDER THE PROVISIONS OF CHAPTER 482 FOR THE PERIOD EXPIRING: May 23, 2018

JOHN S CORNELIUS
1024 HARDWOOD DR
VALRICO, FL 33596

ADAM H. PUTNAM, COMMISSIONER

STATE OF FLORIDA
Department of Agriculture and Consumer Services
BUREAU OF LICENSING AND ENFORCEMENT

Date: September 12, 2016 | File No. JE50707 | Expires: August 31, 2017

THE ID CARD HOLDER NAMED BELOW HAS REGISTERED UNDER THE PROVISIONS OF CHAPTER 482 FOR THE PERIOD EXPIRING: August 31, 2017 AT

BRIGHTVIEW LANDSCAPE SERVICES, INC.
RUSKIN, FL 33570

JOHN SCOTT CORUELIUS
BRIGHTVIEW LANDSCAPE SERVICES, INC
POST OFFICE BOX 5229
SUN CITY CENTER, FL 33573

Regular

ADAM H. PUTNAM, COMMISSIONER

UF IFAS

Certificate of Training
Best Management Practices
Florida Green Industries

The undersigned hereby acknowledges that

John S. Cornelius

has successfully met all requirements necessary to be fully trained through the Green Industries Best Management Practices Program developed by the Florida Department of Environmental Protection with the University of Florida Institute of Food and Agricultural Sciences.

C. White | 11/8/2007

Experience

- 30 years Landscape Maintenance, Design, Installation at BrightView
- 30 years in the Palmetto area

Certifications

- State of Florida Green Industries Best Management Practice
- State of Florida Licensed Pest Control Operator
- Licensed Agricultural Dealer
- Licensed Fertilizer Applicator

Meet Your BrightView Account Manager and CST Leader

Jose Shears currently supervises landscape maintenance activities throughout South County Area. Jose is a Certified Pest Control Operator , and BMP Certified. He has been in the landscape industry for 30 years, 30 Years with BrightView and is well versed in managing crews, Pest and Disease ID and Production.

My focus is to work on site . I will schedules regular site walks with you as needed to review what is happening in your landscape. My role included scheduling, hands-on training in the field and focuses on safety throughout the teams I manages

I am your Team Leader in the CST and will be your point of contact..

Jose Shears

Account Manager

Here are BrightView, we offer more than just mowing:

- Landscape Design and Maintenance
- Hardscapes
- Tree Care Services
- Irrigation
- ... And Much More

Experience

- 30 years' experience in the green industry
- 27 year's employed with BrightView

Certifications

- State of Florida Green Industries Best Management Practice
- Stare of Florida Certified Pest Control Operator

Meet Your BrightView Production Manager and CST Member

Dennis Upper has been working in the landscape industry for over 35 years. Dennis currently supervises landscape maintenance Teams throughout Southern Hillsborough County and has been a key member of the BrightView Team for 10 years.

My focus is to work on site regularly, with the main responsibility of working hand in hand with the Crews and Crew Leaders on quality control as well as assisting in scheduling maintenance tasks week in and week out.

I am your Team Member in the CST and will be your supervisor developing schedules and service days.

Here are BrightView, we offer more than just mowing:

- Landscape Design and Maintenance
- Hardscapes
- Tree Care Services
- Irrigation
- ... And Much More

Dennis Upper

Production Manager

Experience

- 35 years' experience in the green industry
- 10 year's employed with BrightView

Certifications

- Certified State of Florida Green Industries Best Management Practice

Meet Your BrightView Enhancement Manager and CST Team Member

BrightView Landscape Services

Martin Pedilla

Enhancement Manager

Martin currently supervises landscape maintenance business throughout South County Area and has been a key member of the West Florida Team for 30 years. Over this time Martin has been involved in maintenance, renovation, design, installation, irrigation management, and tree care on all of his properties

My focus is to work and spend time with Clients, walking properties and listening to their input on the landscape. I also prides myself spending time with my teams to help explain proper horticulture practices while conveying to them what clients are looking for. My qualities are quick learner and a good listener - so when it comes to dealing with the unique circumstances and needs of your property, I will be quick to adapt and provide you excellent service!

Here are BrightView, we offer more than just mowing:

- Landscape Design and Maintenance
- Hardscapes
- Tree Care Services
- Irrigation
- ... And Much More

Experience

- 30 years in the Florida Green Industry, all with BrightView

Certifications

- State of Florida Green Industries Best Management Practice
- State of Florida Spray operator
- State of Florida Certified Fertilizer Applicator
- MOT Certified

Certificate of Training
Best Management Practices
Florida Green Industries

UF UNIVERSITY of FLORIDA

The undersigned hereby acknowledges that

Martin Padilla

has successfully met all requirements necessary to be fully trained through the Green Industries Best Management Practices Program developed by the Florida Department of Environmental Protection with the University of Florida Institute of Food and Agricultural Sciences.

Donald P. Rainey — Issuer
E. Carvajal — Instructor, 4/9/2010 — Date of Class
Heather Ritchie — DEP Program Administrator

Florida Safety Council

Martin L. Padilla

Maintenance of Traffic
(Intermediate)

July 29, 2005

W. G. Shearer
William "Bill" Shearer
Occupational Safety Manager

American Red Cross

CERTIFICATE of COMPLETION

This is to certify that:

Martin Padilla

has attended

Course Title - Adult First Aid/CPR/AED

and has successfully completed the following elements

AED-Adult : valid 2 Years
Adult CPR : valid 2 Years
Adult First Aid/CPR/AED : valid 2 Years
First Aid : valid 2 Years

Conducted by ValleyCrest Companies

Instructor: John Feidt

on

11/30/2012

Meet Your Director of Technical Services

My focus is to provide agronomic and horticultural support and training for landscape development and landscape maintenance.

Colorado State University

Charles Alex Leggett IV

Bachelor of Science

CERTIFIED PEST CONTROL OPERATOR

CHARLES ALEX LEGGETT IV

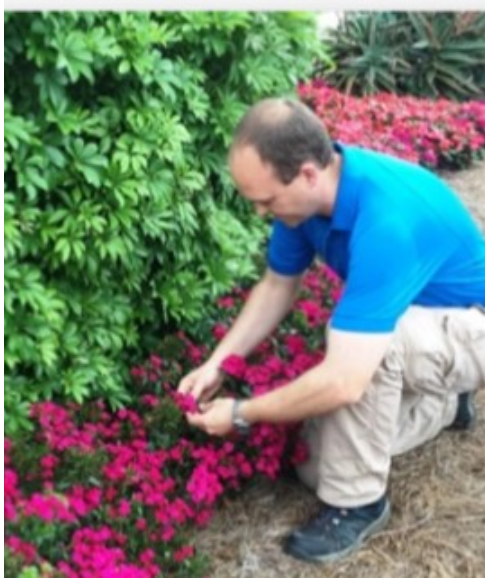
Certificate of Training
Best Management Practices
Florida Green Industries
Instructor

The undersigned hereby acknowledges that

Charles A. Leggett, IV

has successfully met all requirements necessary to be fully trained through the Green Industries Best Management Practices Program developed by the Florida Department of Environmental Protection with the University of Florida Institute of Food and Agricultural Sciences.

D. Rainey 5/22/2012



Cal Leggett

Director of Technical Services
BrightView Landscapes

Education

- Bachelors of Science in Horticulture from Colorado State University
- Instructor of Best Management Practices

Experience

- Environmental Specialist at Florida Department of Agriculture and Consumer Services
- Greenhouse Grower Coordinator at Agri-Starts, Inc.

Certifications

- State of Florida Green Industries Best Management Practice
- Florida Turfgrass Association

Ready & Trained Landscapers

BrightPath Landscaper Development Program

At BrightView, we strive to be the employer of choice. We are committed to identifying new ways to differentiate our work experience. We want our crew members to know this is more than an hourly job—this is a career.

BrightPath helps our crew members:

- Learn the business, meet our customer's needs, and develop skills for a career at BrightView.
- Identify the skills and abilities needed to progress in their current role at BrightView as well as develop the skills they will need for future positions.

Through One BrightView Way, we've set standards for quality, safety and services. And, we ask our crews to deliver on those standards every day. We have clear, consistent expectations of what is required at each of the 4 levels of our Landscaper Development Program.

A Safe Workplace & Community is Our Priority

Safety is our top priority at BrightView and we are committed to keeping our people safe every day across our business. As an organization committed to constant improvement, we actively work to continue developing a best-in-class Safety Management System that results in zero injuries to our team members. We take pride in conducting our business operations in a manner that helps to ensure the safety and well-being of our team members, customers, and the properties in which we operate.

We believe in the following principles:

Safety is our top priority

Appropriate PPE must be worn

Follow-up, report, and learn from incidents

Everyone is responsible for each other

Training is the first step to safe behavior

You are the key to making a difference

BrightView's management is committed to providing a safe work environment and establishing safe work practices for all our employees. We begin all new jobs with a safety inspection. This identifies any job site hazards, roadway hazards and the safest place to operate from onsite.

Trucks are always equipped with cones that are placed around the truck and trailer at all times. We also demonstrate this commitment to safety through a continuing program of education and training, accident prevention, reporting, investigation and analysis, and the development of positive attitudes about safety and awareness about safety by all employees.

The following can be provided upon request:

- Safety Manual
- OSHA Compliance Manual
- Right to Know Program
- Safety Rules and Regulations
- HAZCOM Policy
- Safety Compliance Checklists
- Crew Member Equipment Safety Training Program
- Weekly Safety Talks

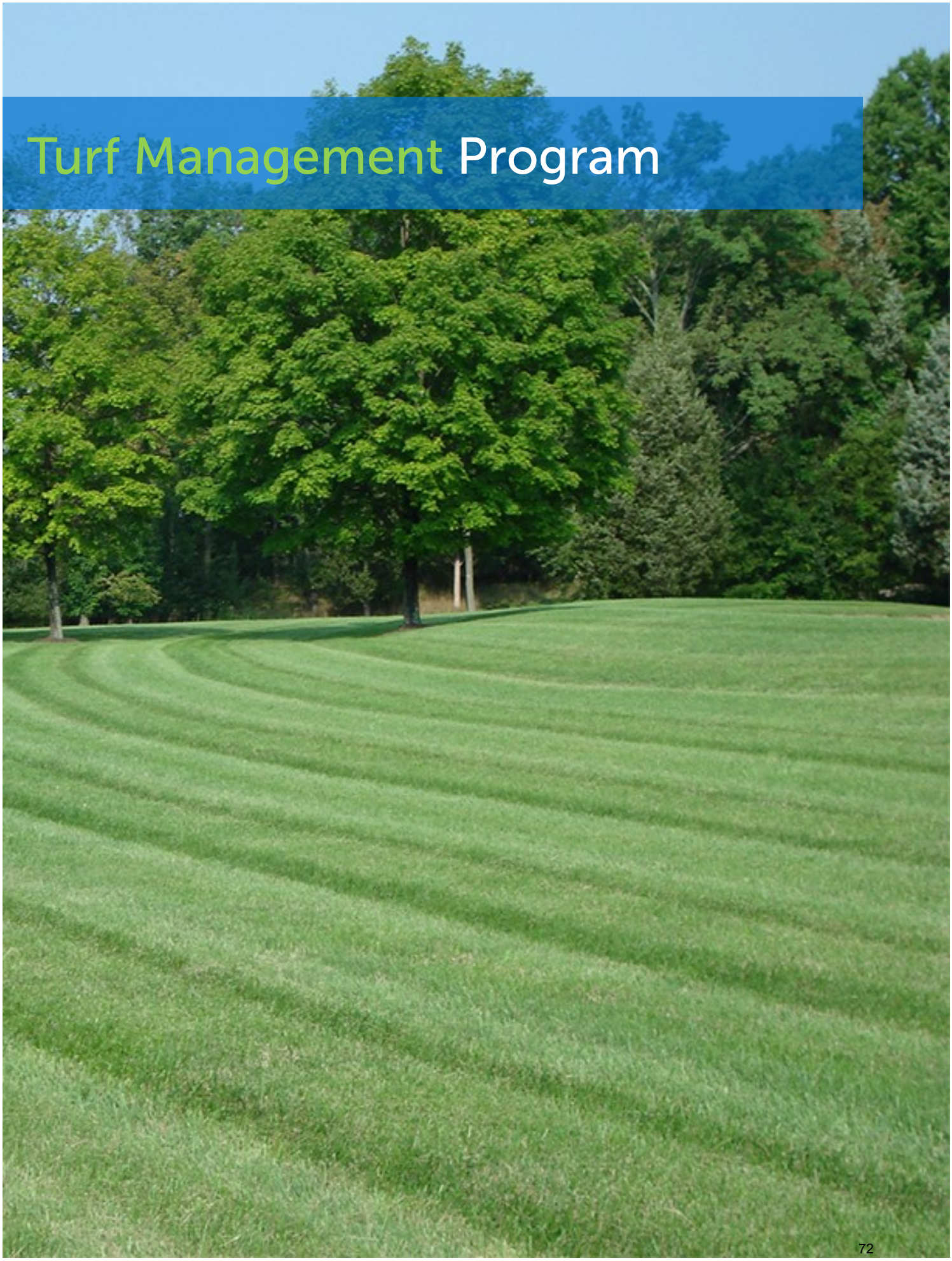
E-Verified Employees

BrightView is enrolled in E-Verify in all states in which we operate to ensure 100% compliance with all US Labor and Immigration laws.

Our participation in this web-based process, currently the best means available to electronically confirm employment eligibility, makes certain that individuals we hire and are working on our client's sites are authorized to work in the United States.

E-Verify is only part of BrightView's robust employment verification program. Our enterprise-wide practice also covers regular training of our staff and semi-annual auditing to maintain compliance with all US Labor and Immigration laws.

Turf Management Program



Every property is different with a unique set of maintenance needs. We took into consideration the requirements outlined in your **RFP to create** the maintenance plan below which is designed to keep your properties looking their best year-round.

Mowing Services

We will deploy a specific mowing crew of 5 Team members to perform all the mowing, edging, string trimming, and blowing. Carlton Lakes CDD will be mapped and the crews will follow that mapping progression through property weekly.

This "mapping" will be provided to Your team in advance of our initial service. We can adjust the weekly mow schedule if we encounter rain, an emergency or a schedule adjustment based around a special event.

We will maintain a weekly schedule for **all St Augustine turf** areas in the growing season and a bi-weekly schedule in the slow growing months.

The following schedule may change according to weather, turf conditions, and fertilization schedule:

Summer	**(weekly)**	(typically March through October);	
Winter	**(bi-weekly)**	(typically November through February).	42 Services

Hand mowers to be used in areas where large, heavy equipment may damage turf or other property.

Grass clippings will be dispersed at each mowing, to eliminate unsightly build-up of grass clippings that may appear after each mowing. Excessive clippings "wash-up", which may occur after heavy rains, will be promptly addressed by dispersal.

Obviously long or heavy grass clippings that cannot be adequately dispersed must be removed. All removed clippings must be recycled in keeping with recommended horticultural procedures unless otherwise stipulated.

Sidewalks and driveways will be edged with every mowing. Borders of plant beds are to be maintained with a distinct edge that separates the bed from adjoining grass. No chemicals shall be used for edging of the beds.

Shrub & Plant Health Care Management

Pruning shall be completed by knowledge trained staff using hand pruning techniques in accordance with the following:

Pruning Schedule

Carlton Lakes CDD will be maintained by specific pruning crew consisting of 4 Gardeners.

High frequented areas will be touched every visit. All areas that require pruning will be done one time completely in every month. This program will afford our team the opportunity to adjust the weekly prune schedule if we encounter rain, an emergency or a schedule adjustment based around a special event.

This will guarantee we maintain all shrub and ground cover beds a minimum of once per month and will minimize the variance of "long and short" shrub pruning every month.

The appearance of all shrubs throughout Carlton Lakes will look more "uniformly pruned" over the course of every month. This schedule will be updated monthly and a copy will be provided to you for final approval.

Several preventative functions are scheduled seasonally. Please note below a general quarterly plan that will become site specific upon further evaluation

Winter Cut back shrubs needing severe thinning, limb up trees.

Spring Apply pre/post emergent weed prevention chemically to all areas, and fertilize. Hard cutbacks for selective plants.

Summer Regular inspections to address plant growth, weeds, and overall plant health, fertilize.

Fall Fertilize at proper rates, monitor irrigation cut backs, and apply pre-emergent weed control for winter weed.