

MERRICK SQUARE

COMMUNITY DEVELOPMENT

DISTRICT

May 16, 2023

BOARD OF SUPERVISORS

REGULAR MEETING

AGENDA

MERRICK SQUARE

COMMUNITY DEVELOPMENT DISTRICT

AGENDA

LETTER

Merrick Square Community Development District
OFFICE OF THE DISTRICT MANAGER
2300 Glades Road, Suite 410W•Boca Raton, Florida 33431
Phone: (561) 571-0010•Toll-free: (877) 276-0889•Fax: (561) 571-0013

May 9, 2023

Board of Supervisors
Merrick Square Community Development District

Dear Board Members:

The Board of Supervisors of the Merrick Square Community Development District will hold a Regular Meeting on May 16, 2023 at 2:30 p.m., at the offices of D.R. Horton, 6123 Lyons Road, Coconut Creek, Florida 33073. The agenda is as follows:

1. Call to Order/Roll Call
2. Public Comments
3. Consideration of Resolution 2023-03, Approving a Proposed Budget for Fiscal Year 2023/2024 and Setting a Public Hearing Thereon Pursuant to Florida Law; Addressing Transmittal, Posting and Publication Requirements; Addressing Severability; and Providing for an Effective Date
4. Consideration of Resolution 2023-04, Designating Dates, Times and Locations for Regular Meetings of the Board of Supervisors of the District for Fiscal Year 2023/2024 and Providing for an Effective Date
5. Consideration of Response(s) to Request for Qualifications (RFQ) for Engineering Services
 - A. Affidavit of Publication
 - B. RFQ Package
 - C. Respondent: *Alvarez Engineers, Inc.*
 - D. Competitive Selection Criteria/Ranking
 - E. Award of Contract
6. Consideration of Responses to Request for Proposals (RFP) for Annual Audit Services
 - A. Affidavit of Publication
 - B. RFP Package
 - C. Respondents
 - I. Berger, Toombs, Elam, Gaines & Frank

ATTENDEES:

Please identify yourself each time you speak to facilitate accurate transcription of meeting minutes.

- II. Grau & Associates
 - D. Auditor Evaluation Matrix/Ranking
 - E. Award of Contract
- 7. Acceptance of Unaudited Financial Statements as of March 31, 2023
- 8. Approval of February 21, 2023 Regular Meeting Minutes
- 9. Staff Reports
 - A. District Counsel: *Billing, Cochran, Lyles, Mauro & Ramsey, P.A.*
 - B. District Engineer: *Alvarez Engineers, Inc.*
 - C. District Manager: *Wrathell, Hunt and Associates, LLC*
 - 0 Registered Voters in District as of April 15, 2023
 - NEXT MEETING DATE: June 20, 2023 at 2:30 PM

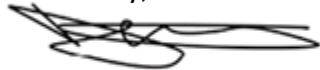
○ QUORUM CHECK

SEAT 1	KARL ALBERTSON	<input type="checkbox"/> IN PERSON	<input type="checkbox"/> PHONE	<input type="checkbox"/> NO
SEAT 2	JAVI TAVEL	<input type="checkbox"/> IN PERSON	<input type="checkbox"/> PHONE	<input type="checkbox"/> NO
SEAT 3	DARLENE DE PAULA	<input type="checkbox"/> IN PERSON	<input type="checkbox"/> PHONE	<input type="checkbox"/> NO
SEAT 4	REBECCA CORTES	<input type="checkbox"/> IN PERSON	<input type="checkbox"/> PHONE	<input type="checkbox"/> NO
SEAT 5	HORACIO GONZALEZ	<input type="checkbox"/> IN PERSON	<input type="checkbox"/> PHONE	<input type="checkbox"/> NO

- 10. Board Members' Comments/Requests
- 11. Public Comments
- 12. Adjournment

If you should have any questions or concerns, please do not hesitate to contact me directly at (561) 909-7930.

Sincerely,



Daniel Rom
District Manager

FOR BOARD MEMBERS AND STAFF TO ATTEND BY TELEPHONE
CALL-IN NUMBER: 1-888-354-0094
PARTICIPANT PASSCODE: 528 064 2804

MERRICK SQUARE

COMMUNITY DEVELOPMENT DISTRICT

3

RESOLUTION 2023-03

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE MERRICK SQUARE COMMUNITY DEVELOPMENT DISTRICT APPROVING A PROPOSED BUDGET FOR FISCAL YEAR 2023/2024 AND SETTING A PUBLIC HEARING THEREON PURSUANT TO FLORIDA LAW; ADDRESSING TRANSMITTAL, POSTING AND PUBLICATION REQUIREMENTS; ADDRESSING SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the District Manager has prepared and submitted to the Board of Supervisors (“**Board**”) of the Merrick Square Community Development District (“**District**”), prior to June 15, 2023, the proposed budget (“**Proposed Budget**”) for the Fiscal Year beginning October 1, 2023 and ending September 30, 2024 (“**Fiscal Year 2023/2024**”); and

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

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE MERRICK SQUARE COMMUNITY DEVELOPMENT DISTRICT:

SECTION 1. PROPOSED BUDGET APPROVED. The Proposed Budget prepared by the District Manager for Fiscal Year 2023/2024, attached hereto as **Exhibit A**, is hereby approved as the basis for conducting a public hearing to adopt said Proposed Budget.

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

DATE: _____

HOUR: _____

LOCATION: office of D.R. Horton
6123 Lyons Road
Coconut Creek, Florida 33073

SECTION 3. TRANSMITTAL OF PROPOSED BUDGET TO LOCAL GENERAL PURPOSE GOVERNMENTS. The District Manager is hereby directed to submit a copy of the Proposed Budget to Broward County at least sixty (60) days prior to the hearing set above.

SECTION 4. POSTING OF PROPOSED BUDGET. In accordance with Section 189.016, *Florida Statutes*, the District’s Secretary is further directed to post the approved Proposed Budget on the District’s website at least two (2) days before the budget hearing date as set forth in Section 2 and shall remain on the website for at least forty-five (45) days.

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

SECTION 6. SEVERABILITY. The invalidity or unenforceability of any one or more provisions of this Resolution shall not affect the validity or enforceability of the remaining portions of this Resolution, or any part thereof.

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

PASSED AND ADOPTED this 16th day of May, 2023.

ATTEST:

**MERRICK SQUARE COMMUNITY
DEVELOPMENT DISTRICT**

Secretary/Assistant Secretary

Chair/Vice Chair, Board of Supervisors

Exhibit A: Fiscal Year 2023/2024 Proposed Budget

Exhibit A: Fiscal Year 2023/2024 Proposed Budget

**MERRICK SQUARE
COMMUNITY DEVELOPMENT DISTRICT
PROPOSED BUDGET
FISCAL YEAR 2024**

**MERRICK SQUARE
COMMUNITY DEVELOPMENT DISTRICT
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**MERRICK SQUARE
COMMUNITY DEVELOPMENT DISTRICT
GENERAL FUND BUDGET
FISCAL YEAR 2024**

	Fiscal Year 2023				Proposed Budget FY 2024
	Adopted Budget FY 2023	Actual through 3/31/2023	Projected through 9/30/2023	Total Actual & Projected Revenue &	
REVENUES					
Assessment levy: on-roll - gross	\$ -				\$ 118,936
Allowable discounts (4%)	-				(4,757)
Assessment levy: on-roll - net	-	\$ -	\$ -	\$ -	114,179
Landowner contribution	103,750	17,552	74,828	92,380	-
Total revenues	<u>103,750</u>	<u>17,552</u>	<u>74,828</u>	<u>92,380</u>	<u>114,179</u>
EXPENDITURES					
Professional & administrative					
Management/accounting/recording	42,000	12,000	30,000	42,000	48,000
Legal	25,000	3,630	10,000	13,630	25,000
Engineering	3,000	-	3,000	3,000	3,000
Audit	5,500	-	5,500	5,500	5,500
Arbitrage rebate calculation	500	-	500	500	500
Dissemination agent	1,000	-	1,000	1,000	1,000
Trustee	5,500	-	5,500	5,500	5,500
Telephone	200	100	100	200	200
Postage	500	7	493	500	500
Printing & binding	500	250	250	500	500
Legal advertising	1,500	382	1,118	1,500	1,500
Annual special district fee	175	175	-	175	175
Insurance - GL and D&O	5,500	5,000	500	5,500	6,050
Contingencies/bank charges	500	-	500	500	500
Website hosting & maintenance	705	-	705	705	705
Website ADA compliance	210	-	210	210	210
Tax collector	-	-	-	-	2,379
Total professional & administrative	<u>92,290</u>	<u>21,544</u>	<u>59,376</u>	<u>80,920</u>	<u>101,219</u>

**MERRICK SQUARE
COMMUNITY DEVELOPMENT DISTRICT
GENERAL FUND BUDGET
FISCAL YEAR 2024**

	Fiscal Year 2023			Total Actual & Projected Revenue &	Proposed Budget FY 2024
	Adopted Budget FY 2023	Actual through 3/31/2023	Projected through 9/30/2023		
Field operations					
Stormwater management					
Field management	2,000	-	2,000	2,000	2,000
Wetland maintenance	3,460	-	3,460	3,460	3,460
Wetland monitoring	2,500	-	2,500	2,500	2,500
Roadway maintenance	3,500	-	3,500	3,500	5,000
Total field operations	11,460	-	11,460	11,460	12,960
Total expenditures	103,750	21,544	70,836	92,380	114,179
Excess/(deficiency) of revenues over/(under) expenditures	-	(3,992)	3,992	-	-
Fund balance - beginning (unaudited)	-	-	(134)	-	-
Fund balance - ending (projected)					
Assigned					
Working capital	-	-	-	-	-
Unassigned	-	(134)	3,858	-	-
Fund balance - ending	\$ -	\$ (134)	\$ 3,858	\$ -	\$ -

**MERRICK SQUARE
COMMUNITY DEVELOPMENT DISTRICT
DEFINITIONS OF GENERAL FUND EXPENDITURES**

EXPENDITURES

Professional & administrative

Management/accounting/recording \$ 48,000

Wrathell, Hunt and Associates, LLC (WHA), specializes in managing community development districts by combining the knowledge, skills and experience of a team of professionals to ensure compliance with all of the District's governmental requirements. WHA develops financing programs, administers the issuance of tax exempt bond financings, operates and maintains the assets of the community.

Legal 25,000

General counsel and legal representation, which includes issues relating to public finance, public bidding, rulemaking, open meetings, public records, real property dedications, conveyances and contracts.

Engineering 3,000

The District's Engineer will provide construction and consulting services, to assist the District in crafting sustainable solutions to address the long term interests of the community while recognizing the needs of government, the environment and maintenance of the District's facilities.

Audit* 5,500

Statutorily required for the District to undertake an independent examination of its books, records and accounting procedures.

Arbitrage rebate calculation 500

To ensure the District's compliance with all tax regulations, annual computations are necessary to calculate the arbitrage rebate liability.

Dissemination agent 1,000

The District must annually disseminate financial information in order to comply with the requirements of Rule 15c2-12 under the Securities Exchange Act of 1934. Wrathell, Hunt & Associates serves as dissemination agent.

Trustee 5,500

Telephone 200

Telephone and fax machine.

Postage 500

Mailing of agenda packages, overnight deliveries, correspondence, etc.

Printing & binding 500

Letterhead, envelopes, copies, agenda packages

Legal advertising 1,500

The District advertises for monthly meetings, special meetings, public hearings, public bids, etc.

Annual special district fee 175

Annual fee paid to the Florida Department of Economic Opportunity.

Insurance - GL and D&O 6,050

Contingencies/bank charges 500

Bank charges and other miscellaneous expenses incurred during the year and automated AP routing etc.

Website hosting & maintenance 705

Website ADA compliance 210

Tax collector 2,379

**MERRICK SQUARE
COMMUNITY DEVELOPMENT DISTRICT
DEFINITIONS OF GENERAL FUND EXPENDITURES**

Field operations

Stormwater management	
Field management	2,000
Wetland maintenance	3,460
Twice per year (1.73 acres)	
Wetland monitoring	2,500
Roadway maintenance	5,000
Total expenditures	<u><u>\$114,179</u></u>

**MERRICK SQUARE
COMMUNITY DEVELOPMENT DISTRICT
DEBT SERVICE FUND BUDGET - SERIES 2023
FISCAL YEAR 2024**

	Fiscal Year 2023				Proposed Budget FY 2024
	Adopted Budget FY 2023	Actual through 3/31/2023	Projected through 9/30/2023	Total Revenue & Expenditures	
REVENUES					
Special assessment - on-roll	\$ -				\$ 307,879
Allowable discounts (4%)	-				(12,315)
Assessment levy: net	-	\$ -	\$ -	\$ -	295,564
Special assessment: off-roll	-		114,103	114,103	-
Total revenues	-	-	114,103	114,103	295,564
EXPENDITURES					
Debt service					
Principal	-	-	-	-	60,000
Interest	-		24,088	24,088	228,206
Total debt service	-	-	24,088	24,088	288,206
Other fees & charges					
Costs of issuance	-	-	158,245	158,245	-
Underwriter's discount	-	-	67,440	67,440	-
Tax collector	-	-	-	-	6,158
Total other fees & charges	-	-	225,685	225,685	6,158
Total expenditures	-	-	249,773	249,773	294,364
Excess/(deficiency) of revenues over/(under) expenditures	-	-	(135,670)	(135,670)	1,200
OTHER FINANCING SOURCES/(USES)					
Bond proceeds	-	-	405,886	405,886	-
Original issue discount	-	-	(11,410)	(11,410)	-
Total other financing sources/(uses)	-	-	394,476	394,476	-
Fund balance:					
Net increase/(decrease) in fund balance	-	-	258,806	258,806	1,200
Beginning fund balance (unaudited)	-	-	-	-	258,806
Ending fund balance (projected)	\$ -	\$ -	\$ 258,806	\$ 258,806	260,006
Use of fund balance:					
Debt service reserve account balance (required)					(144,703)
Principal and Interest expense - November 1, 2024					(112,753)
Projected fund balance surplus/(deficit) as of September 30, 2024					<u>\$ 2,550</u>

**MERRICK SQUARE
COMMUNITY DEVELOPMENT DISTRICT
SERIES 2023 AMORTIZATION SCHEDULE**

	Principal	Coupon Rate	Interest	Debt Service	Bond Balance
05/01/23			24,088.44	24,088.44	4,215,000.00
11/01/23			114,103.13	114,103.13	4,215,000.00
05/01/24	60,000.00	4.500%	114,103.13	174,103.13	4,155,000.00
11/01/24			112,753.13	112,753.13	4,155,000.00
05/01/25	65,000.00	4.500%	112,753.13	177,753.13	4,090,000.00
11/01/25			111,290.63	111,290.63	4,090,000.00
05/01/26	65,000.00	4.500%	111,290.63	176,290.63	4,025,000.00
11/01/26			109,828.13	109,828.13	4,025,000.00
05/01/27	70,000.00	4.500%	109,828.13	179,828.13	3,955,000.00
11/01/27			108,253.13	108,253.13	3,955,000.00
05/01/28	70,000.00	4.500%	108,253.13	178,253.13	3,885,000.00
11/01/28			106,678.13	106,678.13	3,885,000.00
05/01/29	75,000.00	4.500%	106,678.13	181,678.13	3,810,000.00
11/01/29			104,990.63	104,990.63	3,810,000.00
05/01/30	80,000.00	4.500%	104,990.63	184,990.63	3,730,000.00
11/01/30			103,190.63	103,190.63	3,730,000.00
05/01/31	85,000.00	5.400%	103,190.63	188,190.63	3,645,000.00
11/01/31			100,895.63	100,895.63	3,645,000.00
05/01/32	90,000.00	5.400%	100,895.63	190,895.63	3,555,000.00
11/01/32			98,465.63	98,465.63	3,555,000.00
05/01/33	90,000.00	5.400%	98,465.63	188,465.63	3,465,000.00
11/01/33			96,035.63	96,035.63	3,465,000.00
05/01/34	95,000.00	5.400%	96,035.63	191,035.63	3,370,000.00
11/01/34			93,470.63	93,470.63	3,370,000.00
05/01/35	105,000.00	5.400%	93,470.63	198,470.63	3,265,000.00
11/01/35			90,635.63	90,635.63	3,265,000.00
05/01/36	110,000.00	5.400%	90,635.63	200,635.63	3,155,000.00
11/01/36			87,665.63	87,665.63	3,155,000.00
05/01/37	115,000.00	5.400%	87,665.63	202,665.63	3,040,000.00
11/01/37			84,560.63	84,560.63	3,040,000.00
05/01/38	120,000.00	5.400%	84,560.63	204,560.63	2,920,000.00
11/01/38			81,320.63	81,320.63	2,920,000.00
05/01/39	130,000.00	5.400%	81,320.63	211,320.63	2,790,000.00
11/01/39			77,810.63	77,810.63	2,790,000.00
05/01/40	135,000.00	5.400%	77,810.63	212,810.63	2,655,000.00
11/01/40			74,165.63	74,165.63	2,655,000.00
05/01/41	140,000.00	5.400%	74,165.63	214,165.63	2,515,000.00
11/01/41			70,385.63	70,385.63	2,515,000.00
05/01/42	150,000.00	5.400%	70,385.63	220,385.63	2,365,000.00
11/01/42			66,335.63	66,335.63	2,365,000.00
05/01/43	160,000.00	5.400%	66,335.63	226,335.63	2,205,000.00
11/01/43			62,015.63	62,015.63	2,205,000.00
05/01/44	170,000.00	5.625%	62,015.63	232,015.63	2,035,000.00
11/01/44			57,234.38	57,234.38	2,035,000.00
05/01/45	180,000.00	5.625%	57,234.38	237,234.38	1,855,000.00
11/01/45			52,171.88	52,171.88	1,855,000.00
05/01/46	190,000.00	5.625%	52,171.88	242,171.88	1,665,000.00
11/01/46			46,828.13	46,828.13	1,665,000.00
05/01/47	200,000.00	5.625%	46,828.13	246,828.13	1,465,000.00

**MERRICK SQUARE
COMMUNITY DEVELOPMENT DISTRICT
SERIES 2023 AMORTIZATION SCHEDULE**

	Principal	Coupon Rate	Interest	Debt Service	Bond Balance
11/01/47			41,203.13	41,203.13	1,465,000.00
05/01/48	210,000.00	5.625%	41,203.13	251,203.13	1,255,000.00
11/01/48			35,296.88	35,296.88	1,255,000.00
05/01/49	225,000.00	5.625%	35,296.88	260,296.88	1,030,000.00
11/01/49			28,968.75	28,968.75	1,030,000.00
05/01/50	235,000.00	5.625%	28,968.75	263,968.75	795,000.00
11/01/50			22,359.38	22,359.38	795,000.00
05/01/51	250,000.00	5.625%	22,359.38	272,359.38	545,000.00
11/01/51			15,328.13	15,328.13	545,000.00
05/01/52	265,000.00	5.625%	15,328.13	280,328.13	280,000.00
11/01/52			7,875.00	7,875.00	280,000.00
05/01/53	280,000.00	5.625%	7,875.00	287,875.00	-
Total	4,215,000.00		4,548,320.94	8,763,320.94	

**MERRICK SQUARE
COMMUNITY DEVELOPMENT DISTRICT
ASSESSMENT COMPARISON
PROJECTED FISCAL YEAR 2024 ASSESSMENTS**

On-Roll					
<u>Product/Parcel</u>	<u>Units</u>	<u>FY 2024 O&M Assessment per Unit</u>	<u>FY 2024 DS Assessment per Unit</u>	<u>FY 2024 Total Assessment per Unit</u>	<u>FY 2023 Total Assessment per Unit</u>
TH	211	\$ 563.68	\$ 1,459.14	\$ 2,022.82	\$ 824.28
Total	211				

MERRICK SQUARE

COMMUNITY DEVELOPMENT DISTRICT

4

RESOLUTION 2023-04

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE MERRICK SQUARE COMMUNITY DEVELOPMENT DISTRICT DESIGNATING DATES, TIMES AND LOCATIONS FOR REGULAR MEETINGS OF THE BOARD OF SUPERVISORS OF THE DISTRICT FOR FISCAL YEAR 2023/2024 AND PROVIDING FOR AN EFFECTIVE DATE

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

WHEREAS, the District is required by Section 189.015, *Florida Statutes*, to file quarterly, semi-annually, or annually a schedule (including date, time, and location) of its regular meetings with local governing authorities; and

WHEREAS, further, in accordance with the above-referenced statute, the District shall also publish quarterly, semi-annually, or annually the District’s regular meeting schedule in a newspaper of general paid circulation in the county in which the District is located.

WHEREAS, the Board desires to adopt the Fiscal Year 2023/2024 meeting schedule attached as **Exhibit A**.

NOW THEREFORE BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE MERRICK SQUARE COMMUNITY DEVELOPMENT DISTRICT:

1. **ADOPTING FISCAL YEAR 2023/2024 ANNUAL MEETING SCHEDULE.** The Fiscal Year 2023/2024 annual meeting schedule attached hereto and incorporated by reference herein as **Exhibit A** is hereby approved and shall be published in accordance with the requirements of Florida law and also provided to applicable governing authorities.

2. **EFFECTIVE DATE.** This Resolution shall become effective immediately upon its adoption.

PASSED AND ADOPTED this 16th day of May, 2023.

ATTEST:

**MERRICK SQUARE COMMUNITY
DEVELOPMENT DISTRICT**

Secretary/Assistant Secretary

Chair/Vice Chair, Board of Supervisors

EXHIBIT "A"

MERRICK SQUARE COMMUNITY DEVELOPMENT DISTRICT		
BOARD OF SUPERVISORS FISCAL YEAR 2023/2024 MEETING SCHEDULE		
LOCATION		
<i>offices of D.R. Horton, 6123 Lyons Road, Coconut Creek, Florida 33073</i>		
DATE	POTENTIAL DISCUSSION/FOCUS	TIME
October 17, 2023	Regular Meeting	2:30 PM
November 21, 2023	Regular Meeting	2:30 PM
December 19, 2023	Regular Meeting	2:30 PM
January 16, 2024	Regular Meeting	2:30 PM
February 20, 2024	Regular Meeting	2:30 PM
March 19, 2024	Regular Meeting	2:30 PM
April 16, 2024	Regular Meeting	2:30 PM
May 21, 2024	Regular Meeting	2:30 PM
June 18, 2024	Regular Meeting	2:30 PM
July 16, 2024	Regular Meeting	2:30 PM
August 20, 2024	Regular Meeting	2:30 PM
September 17, 2024	Regular Meeting	2:30 PM

MERRICK SQUARE

COMMUNITY DEVELOPMENT DISTRICT

5A

SUN-SENTINEL

Sold To:

Merrick Square Community Development District - CU80131802
2300 Glades Rd, Ste 410W
Boca Raton,FL 33431-8556

Bill To:

Merrick Square Community Development District - CU80131802
2300 Glades Rd, Ste 410W
Boca Raton,FL 33431-8556

Published Daily

Fort Lauderdale, Broward County, Florida
Boca Raton, Palm Beach County, Florida
Miami, Miami-Dade County, Florida

State Of Florida
County Of Orange

Before the undersigned authority personally appeared
Rose Williams, who on oath says that he or she is a duly authorized representative of the SUN- SENTINEL,
a DAILY newspaper published in BROWARD/PALM BEACH/MIAMI-DADE County, Florida; that the
attached copy of advertisement, being a Legal Notice in:

The matter of 11700-Advertisement for Bids ,
n
Was published in said newspaper by print in the issues of, or by publication on the
newspaper’s website, if authorized on Feb 19, 2023

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

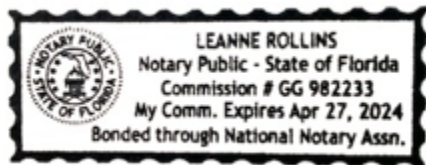


Signature of Affiant

Sworn to and subscribed before me this: February 20, 2023.



Signature of Notary Public



Name of Notary, Typed, Printed, or Stamped
Personally Known (X) or Produced Identification ()

Affidavit Delivery Method: E-Mail
Affidavit Email Address: gillyardd@whhassociates.com
7383501

**REQUEST FOR QUALIFICATIONS FOR
ENGINEERING SERVICES
FOR THE MERRICK SQUARE COMMU-
NITY DEVELOPMENT DISTRICT
RFQ FOR ENGINEERING SERVICES**

The Merrick Square Community Development District ("District"), located in Broward County, Florida, announces that professional engineering services will be required on a continuing basis for the District's stormwater systems, and other public improvements authorized by Chapter 190, Florida Statutes. The engineering firm selected will act in the general capacity of District Engineer and will provide District engineering services, as required.

Any firm or individual ("Applicant") desiring to provide professional services to the District must: 1) hold applicable federal, state and local licenses; 2) be authorized to do business in Florida in accordance with Florida law; and 3) furnish a statement ("Qualification Statement") of its qualifications and past experience on U.S. General Service Administration's "Architect-Engineer Qualifications, Standard Form No. 330," with pertinent supporting data.

Among other things, Applicants must submit information relating to: a) the ability and adequacy of the Applicant's professional personnel; b) whether the Applicant is a certified minority business enterprise; c) the Applicant's willingness to meet time and budget requirements; d) the Applicant's past experience and performance, including but not limited to past experience as a District Engineer for any community development districts and past experience with Broward County; e) the geographic location of the Applicant's headquarters and offices; f) the current and projected workloads of the Applicant; and g) the volume of work previously awarded to the Applicant by the District. Further, each Applicant must identify the specific individual affiliated with the Applicant who would be handling District meetings, construction services, and other engineering tasks.

The District will review all Applicants and will comply with Florida law, including the Consultant's Competitive Negotiations Act, Chapter 287, Florida Statutes ("CCNA"). All Applicants interested must submit electronic copies of Standard Form No. 330 and the Qualification Statement by 12:00 p.m. on March 6, 2023 to the attention of Wrathell, Hunt & Associates, LLC (by email to: gillyardd@whhassociates.com) ("District Manager's Office").

The Board shall select and rank the Applicants using the requirements set forth in the CCNA and the evaluation criteria on file with the District Manager,

SUN-SENTINEL

and the highest ranked Applicant will be requested to enter into contract negotiations. If an agreement cannot be reached between the District and the highest ranked Applicant, negotiations will cease and begin with the next highest ranked Applicant, and if these negotiations are unsuccessful, will continue to the third highest ranked Applicant.

The District reserves the right to reject any and all Qualification Statements. Additionally, there is no express or implied obligation for the District to reimburse Applicants for any expenses associated with the preparation and submittal of the Qualification Statements in response to this request.

Any protest regarding the terms of this Notice, or the evaluation criteria on file with the District Manager, must be filed in writing, within seventy-two (72) hours (excluding weekends) after the publication of this Notice. The formal protest setting forth with particularity the facts and law upon which the protest is based shall be filed within seven (7) calendar days after the initial notice of protest was filed. Failure to timely file a notice of protest or failure to timely file a formal written protest shall constitute a waiver of any right to object or protest with respect to aforesaid Notice or evaluation criteria provisions. Any person who files a notice of protest shall provide to the District, simultaneous with the filing of the notice, a protest bond with a responsible surety to be approved by the District and in the amount of Twenty Thousand Dollars (\$20,000.00).

2/19/2023 7383501

Order # - 7383501

MERRICK SQUARE

COMMUNITY DEVELOPMENT DISTRICT

5B

**REQUEST FOR QUALIFICATIONS FOR ENGINEERING SERVICES
FOR THE MERRICK SQUARE COMMUNITY DEVELOPMENT DISTRICT**

RFQ for Engineering Services

The Merrick Square Community Development District (“**District**”), located in Broward County, Florida, announces that professional engineering services will be required on a continuing basis for the District’s stormwater systems, and other public improvements authorized by Chapter 190, *Florida Statutes*. The engineering firm selected will act in the general capacity of District Engineer and will provide District engineering services, as required.

Any firm or individual (“**Applicant**”) desiring to provide professional services to the District must: 1) hold applicable federal, state and local licenses; 2) be authorized to do business in Florida in accordance with Florida law; and 3) furnish a statement (“**Qualification Statement**”) of its qualifications and past experience on U.S. General Service Administration’s “Architect-Engineer Qualifications, Standard Form No. 330,” with pertinent supporting data. Among other things, Applicants must submit information relating to: a) the ability and adequacy of the Applicant’s professional personnel; b) whether the Applicant is a certified minority business enterprise; c) the Applicant’s willingness to meet time and budget requirements; d) the Applicant’s past experience and performance, including but not limited to past experience as a District Engineer for any community development districts and past experience with Broward County; e) the geographic location of the Applicant’s headquarters and offices; f) the current and projected workloads of the Applicant; and g) the volume of work previously awarded to the Applicant by the District. Further, each Applicant must identify the specific individual affiliated with the Applicant who would be handling District meetings, construction services, and other engineering tasks.

The District will review all Applicants and will comply with Florida law, including the Consultant’s Competitive Negotiations Act, Chapter 287, *Florida Statutes* (“**CCNA**”). All Applicants interested must submit electronic copies of Standard Form No. 330 and the Qualification Statement by 12:00 p.m. on March 6, 2023 to the attention of Wrathell, Hunt & Associates, LLC (by email to: gillyardd@whhassociates.com) (“**District Manager’s Office**”).

The Board shall select and rank the Applicants using the requirements set forth in the CCNA and the evaluation criteria on file with the District Manager, and the highest ranked Applicant will be requested to enter into contract negotiations. If an agreement cannot be reached between the District and the highest ranked Applicant, negotiations will cease and begin with the next highest ranked Applicant, and if these negotiations are unsuccessful, will continue to the third highest ranked Applicant.

The District reserves the right to reject any and all Qualification Statements. Additionally, there is no express or implied obligation for the District to reimburse Applicants for any expenses associated with the preparation and submittal of the Qualification Statements in response to this request.

Any protest regarding the terms of this Notice, or the evaluation criteria on file with the District Manager, must be filed in writing, within seventy-two (72) hours (excluding weekends) after the publication of this Notice. The formal protest setting forth with particularity the facts and law upon which the protest is based shall be filed within seven (7) calendar days after the initial notice of protest was filed. Failure to timely file a notice of protest or failure to timely file a formal written protest shall constitute a waiver of any right to object or protest with respect to aforesaid Notice or evaluation criteria provisions. Any person who files a notice of protest shall provide to the District, simultaneous with the filing of the notice, a protest bond with a responsible surety to be approved by the District and in the amount of Twenty Thousand Dollars (\$20,000.00).

MERRICK SQUARE COMMUNITY DEVELOPMENT DISTRICT

DISTRICT ENGINEER PROPOSALS

COMPETITIVE SELECTION CRITERIA

1) Ability and Adequacy of Professional Personnel (Weight: 25 Points)

Consider the capabilities and experience of key personnel within the firm including certification, training, and education; affiliations and memberships with professional organizations; etc.

2) Consultant's Past Performance (Weight: 25 Points)

Past performance for other Community Development Districts in other contracts; amount of experience on similar projects; character, integrity, reputation, of respondent; etc.

3) Geographic Location (Weight: 20 Points)

Consider the geographic location of the firm's headquarters, offices and personnel in relation to the project.

4) Willingness to Meet Time and Budget Requirements (Weight: 15 Points)

Consider the consultant's ability and desire to meet time and budget requirements including rates, staffing levels and past performance on previous projects; etc.

5) Certified Minority Business Enterprise (Weight: 5 Points)

Consider whether the firm is a Certified Minority Business Enterprise. Award either all eligible points or none.

6) Recent, Current and Projected Workloads (Weight: 5 Points)

Consider the recent, current and projected workloads of the firm.

7) Volume of Work Previously Awarded to Consultant by District (Weight: 5 Points)

Consider the desire to diversify the firms that receive work from the District; etc.

MERRICK SQUARE

COMMUNITY DEVELOPMENT DISTRICT

5C

**RESPONSE TO REQUEST FOR
QUALIFICATIONS FOR
ENGINEERING SERVICES**

**MERRICK SQUARE
COMMUNITY
DEVELOPMENT
DISTRICT**

**Alvarez Engineers, Inc.
8935 NW 35 Lane, Suite 101
Doral, FL 33172
(305)640-1345**

March 3, 2023



8935 NW 35 Lane, Suite 101 Doral, FL 33172

Tel (305) 640-1345

Email Alvarez@AlvarezEng.com

Website www.alvarezeng.com

March 3, 2023

Ms. Daphne Gillyard
Merrick Square Community Development District
Wrathell, Hunt & Associates, LLC
District Manager's Office
gillyardd@whhassociates.com

Re.: Response to Request for Proposals for Engineering Services for Merrick Square CDD

Dear Ms. Gillyard,

Alvarez Engineers, Inc. is pleased to submit this proposal. Our firm, located in Doral, Florida, is experienced and has the qualifications, personnel, and resources necessary to serve as District Engineer to Merrick Square Community Development District. Since 1998 our firm has been Engineering Consultant to over 70 Community Development Districts throughout Miami-Dade, Broward and Charlotte Counties which have issued more than \$1,400,000,000 in bonds for financing public infrastructure.


Alvarez Engineers is intimately familiar with the Merrick Square project. As Consulting Engineer, our firm assisted during the formation phase of the District by identifying and estimating the cost of the infrastructure to be financed with District-issued bonds. The results were summarized in an Engineer's Report that was presented to, and accepted by, the District's Board of Supervisors on December 14, 2021.

For your consideration, I am enclosing Standard Form 330 which includes information regarding our corporation's personnel, qualifications, and experience. I have also enclosed our current State of Florida Minority Business Certification.

Should Alvarez Engineers be selected to serve as District Engineer, I will be serving as the firm's Principal Officer. I will be the primary contact to handle District meetings, construction services and other engineering tasks, with the support of our staff listed in Standard Form 330. Alvarez Engineers is willing to meet time and budget requirements for Merrick Square, and our recent, current, and projected workload will not hinder us from providing the required services.

Please do not hesitate to contact me at 305-640-1345 or at Juan.Alvarez@AlvarezEng.com. If you have any questions or require additional information.

Sincerely,
Alvarez Engineers, Inc.

DocuSigned by:

91E21FBBCEDD4E0...
Juan R. Alvarez, P.E.
President

ARCHITECT-ENGINEER QUALIFICATIONS

PART I - CONTRACT-SPECIFIC QUALIFICATIONS

A. CONTRACT INFORMATION

1. TITLE AND LOCATION <i>(City and State)</i> Merrick Square CDD (Broward County, Florida)		
2. PUBLIC NOTICE DATE 02/19/2023	3. SOLICITATION OR PROJECT NUMBER 7383501	

B. ARCHITECT-ENGINEER POINT OF CONTACT

4. NAME AND TITLE Juan R. Alvarez, P.E., President		
5. NAME OF FIRM Alvarez Engineers, Inc.		
6. TELEPHONE NUMBER 305-640-1345	7. FAX NUMBER 305-640-1346	8. E-MAIL ADDRESS Juan.Alvarez@Alvarezeng.com

C. PROPOSED TEAM

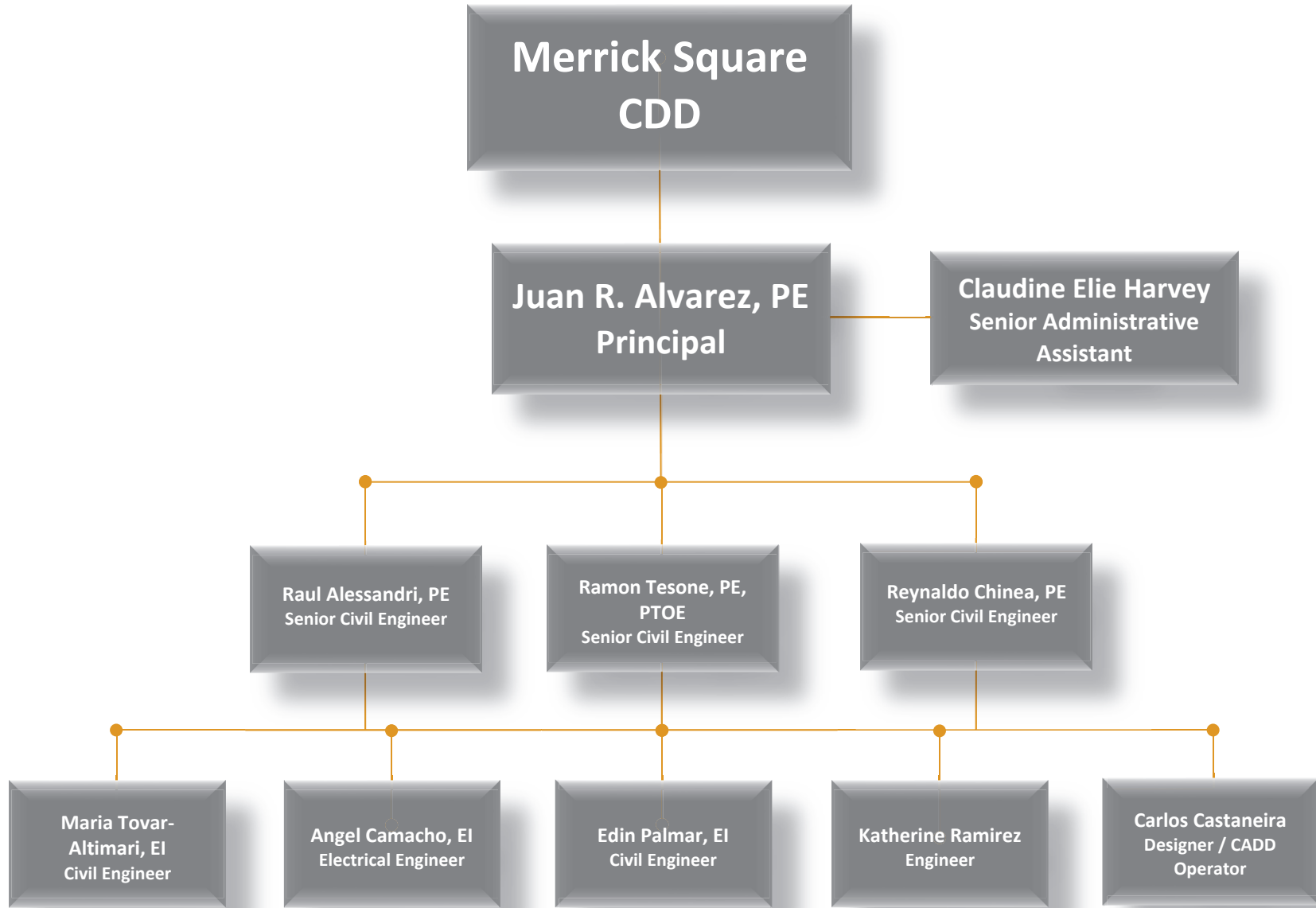
(Complete this section for the prime contractor and all key subcontractors.)

	(Check)			9. FIRM NAME	10. ADDRESS	11. ROLE IN THIS CONTRACT
	PRIME	J-V	PARTNER			
a.	✓			Alvarez Engineers, Inc. <input type="checkbox"/> CHECK IF BRANCH OFFICE	8935 NW 35 Lane, Suite 101 Doral, FL 33172	District Engineer
b.				 <input type="checkbox"/> CHECK IF BRANCH OFFICE		
c.				 <input type="checkbox"/> CHECK IF BRANCH OFFICE		
d.				 <input type="checkbox"/> CHECK IF BRANCH OFFICE		
e.				 <input type="checkbox"/> CHECK IF BRANCH OFFICE		
f.				 <input type="checkbox"/> CHECK IF BRANCH OFFICE		

D. ORGANIZATIONAL CHART OF PROPOSED TEAM

(Attached)

Organizational Chart



E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT*(Complete one Section E for each key person.)*

12. NAME Juan R. Alvarez, P.E		13. ROLE IN THIS CONTRACT Principal / District Engineer		14. YEARS EXPERIENCE	
				a. TOTAL 43	b. WITH CURRENT FIRM 28
15. FIRM NAME AND LOCATION <i>(City and State)</i> Alvarez Engineers, Inc. (City of Doral, Florida)					
16. EDUCATION <i>(Degree and Specialization)</i> B.S. in Civil Engineering B.S in Architectural Engineering			17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Florida Professional Engineer #38522		
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i> National Society of Professional Engineers; Florida Engineering Society; American Society of Civil Engineers					

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i> Grand Bay at Doral CDD (City of Doral, Miami Dade County, FL)		(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES On going	CONSTRUCTION <i>(If applicable)</i>
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE a. The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Grand Bay at Doral, a 334 acre residential development / Estimated Cost: \$168,000,000. Role: District Engineer / Professional services: 2006 - present		<input checked="" type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> Beacon Tradeport CDD (Miami-Dade County, FL)		(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES On going	CONSTRUCTION <i>(If applicable)</i>
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE b. The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure for a 377 gross-acre industrial and commercial development which includes Dolphin Mall and a 1,282 space parking garage / Estimated cost: \$90,000,000 Role: District Engineer / Professional services: 1998 - present		<input checked="" type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> Landmark at Doral CDD (City of Doral, Miami-Dade County, FL)		(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES On going	CONSTRUCTION <i>(If applicable)</i>
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE c. The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure of Landmark at Doral, a 118 acre mixed use development. The development offers residential, retail, office and industrial uses / Estimated cost: \$75,000,000 Role: District Engineer / Professional services: 2005 - present		<input checked="" type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> Centre Lake CDD (Town of Miami Lakes, Miami-Dade County, FL)		(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES On going	CONSTRUCTION <i>(If applicable)</i>
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE d. The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure for a 142.67 acre residential development, which will give access and service to 256 single family units and 226 townhomes. / Estimated cost: \$48,433,917 Role: District Engineer / Professional services: 2015 - present		<input checked="" type="checkbox"/> Check if project performed with current firm	
(1) TITLE AND LOCATION <i>(City and State)</i> Oakridge CDD (City of Hollywood, Broward County)		(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES On going	CONSTRUCTION <i>(If applicable)</i>
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE e. The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure for a 275.42 acre residential development, which will give access and service to 117 residential units. Estimated cost: \$3,185,686 Role: District Engineer / Professional services: 2016 - present		<input checked="" type="checkbox"/> Check if project performed with current firm	


Education

B.S., Civil Engineering,
University of Miami, 1979

B.S., Architectural
Engineering,
University of Miami, 1979

Registrations

Professional Engineer
Florida # 38522

**Professional
Affiliations**

National Society of
Professional
Engineers

Florida Engineering
Society

Office Location

8935 NW 35 Lane
Suite 101
Doral, FL 33172

**Employment with
Alvarez Engineers**

1996 – Present

Mr. Alvarez is the founder and President of Alvarez Engineers, a company specializing in Civil Engineering, with offices in Miami, Florida. He has had extensive experience in the past 40 years in the fields of Highway Design, Land Development, Community Development Districts, Stormwater Management Systems and Architectural Engineering projects.

Alvarez Engineers, under the leadership of Mr. Alvarez, has been providing Highway Design engineering services to the Florida Department of Transportation continuously for over 24 years in Miami-Dade and Monroe counties. Alvarez Engineers has acquired extensive experience designing numerous other roadway projects of varying sizes for the Consultant Management and Drainage divisions of FDOT, including Drainage, Signing and Pavement Marking, Signalization and Street Lighting located from the rural highways in the Lower Keys to the highly-urbanized area of Downtown Miami.

Mr. Alvarez' experience has enabled him to successfully complete and coordinate projects with agencies such as the Florida Department of Transportation, Miami-Dade County Expressway Authority, Miami-Dade Public Works, Miami-Dade DERM, Miami Dade WASD, South Florida Water Management District, the United States Army Corps of Engineers, the Department of Environmental Protection, Southwest Florida Water Management District, Saint Johns River Water Management District, the City of Miami, the City of Miami Beach, the City of North Miami, Surfside, Hallandale Beach and others.

CDD project experience includes on-going services as District Engineer for:

Aventura Isles CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 166 townhomes, and 487 single family homes on 148.15 acres. Client: Aventura Isles CDD. District Manager: Wrathell, Hunt and Associates, LLC. (2022 – Present)

Griffin Lakes CDD – City of Dania Beach, Broward County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 427 townhomes on 33.62 acres. Client: Griffin Lakes CDD. District Manager: Governmental Management Services. (2021 – Present)

Silver Palms West CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 183 single family homes, 253 villas, and 217 townhomes on 79.27 acres. Client: Silver Palms West CDD. District Manager: Governmental Management Services. (2021 – Present)

Westview North CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 102 single family homes, 346 villa units, and 285 townhomes on 88.12 acres. Client: Westview North CDD. District Manager: Governmental Management Services. (2021 – Present)

Pine Isle CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 57 single family units, 211 villa units, and 188 townhomes on 45.10 acres. Client: Pine Isle CDD. District Manager: Governmental Management Services. (2020 – Present)

Crystal Cay CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 32 single family units, 153 townhomes and 140 townhomes-villas on 60.31 acres. Client: Crystal Cay CDD. District Manager: Governmental Management Services. (2020 – Present)

Sawyer's Landing CDD – City of Miami, Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access

and service to an 18-story, 578-apartment unit residential/commercial building with a 955-space public parking garage on 3.42 acres. Client: Sawyer's Landing CDD. District Manager: Governmental Management Services. (2019 – Present)

Botaniko CDD – City of Weston, Broward County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 125 single family homes on 116.93 acres. Client: Botaniko CDD. District Manager: Governmental Management Services. (2020 – Present)

Kingman Gate CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 117 single family units, 349 townhomes and 304 villas on 79.62 acres. Client: Kingman Gate CDD. District Manager: Governmental Management Services. (2019 – Present)

Century Park South CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 156 condominiums and 121 townhomes on 18.73 acres. Client: Century Park South CDD. District Manager: Special District Services, Inc. (2019 – Present)

Hemingway Point CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 321 single family homes on 57.6 acres. Client: Hemingway Point CDD. District Manager: Governmental Management Services. (2018 – Present)

Waterstone CDD – Saint Lucie County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 544 single family homes and 176 multifamily units on 240.07 acres. Client: Waterstone CDD. District Manager: Governmental Management Services. (2018 – Present)

Quail Roost CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 85 single family units on 33.08 acres. Client: Quail Roost CDD. District Manager: Governmental Management Services. (2018 – Present)

San Simeon CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 55 single family units and 647 townhomes, for a total of 702 residential units on 181.35 acres. Client: San Simeon CDD. District Manager: Governmental Management Services. (2018 – Present)

Century Park Place CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 122 townhomes on 9.58 acres. Client: Century Park Place CDD. District Manager: Special District Services, Inc. (2017 – Present)

Downtown Doral South CDD – City of Doral, Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to single family units, 557 townhomes and 398 multi-family units on 123.39 acres. Client: Downtown Doral South CDD. District Manager: Governmental Management Services. (2016 – Present)

Oakridge CDD - City of Hollywood, Broward County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to single family units on 242.80 acres. Client: Oakridge CDD. District Manager: Governmental Management Services. (2016 – Present)

Two Lakes CDD - City of Hialeah, Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 203 single family units, 256 townhomes, and 506 villas on 130.14 acres. Client: Two Lakes CDD. District Manager: Special District Services, Inc. (2016 – Present)

Oleta River CDD - City of North Miami, Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 3,755 residential units, 560 Assisted/Independent Unit Facilities, condominium units, 150 hotel rooms, and approximately 1,491,256 square feet of commercial, office, vehicle sales and display, institutional and/or retail space on 183.55 acres. Client: Oleta River CDD. District Manager: Governmental Management Services. (2016 – Present)

Centre Lake CDD - Town of Miami Lakes, Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 256 single family units and 226 townhomes on 142.67 acres. Client: Centre Lake CDD. District Manager: Governmental Management Services. (2016 – Present)

Coco Palms CDD - Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 181 single family units, 309 townhomes and 253 villas homes on 91.43 acres. Client: Coco Palms CDD. District Manager: Special District Services, Inc. (2014 – Present)

Bonterra CDD – City of Hialeah, Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 858 residential units on 109 acres. Client: Bonterra CDD. District Manager: Inframark Infrastructure Management Services. (2015 – 2019)

Lakes by the Bay South CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to single family and multi-family units on 516 acres. Client: Lakes by the Bay South CDD. District Manager: Governmental Management Services. (2015 – Present)

South Kendall CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 155 homes on 54.30 acres. Client: South Kendall CDD. District Manager: Governmental Management Services. (2013 – Present)

Academical Village CDD – Town of Davie, Broward County, FL. District Engineer overseeing the development of the infrastructure on a university campus on 39.54 acres. Client: Academical Village CDD. District Manager: Governmental Management Services. (2010 – Present).

Hollywood Beach CDD 1 – City of Hollywood Beach, Broward County, FL. District Engineer overseeing the development of the infrastructure of a guest room hotel building with a public and guest parking garage on 5.13 acres. Client: Hollywood Beach CDD 1. District Manager: Governmental Management Services. (2011 – Present).

Spicewood CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure on 77.72 acres. Client: Spicewood CDD. District Manager: Inframark Infrastructure Management Services. (2011 – Present)

Midtown Miami CDD, City of Miami, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to residential and commercial units on 56 acres. Client: Midtown Miami CDD. District Manager: Wrathell, Hunt & Associates, LLC. (2010 – Present).

Meadow Pines CDD, City of Pembroke Pines, Broward County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 812 townhouses on 123.30 acres. Client: Meadow Pines CDD. District Manager: Special District Services, Inc. (2009 – 2010).

Stonegate CDD, City of Homestead, Miami-Dade County, FL. District

Engineer overseeing the development of the infrastructure that will give access and service to 1,055 dwelling units on 137 acres. Client: Stonegate CDD. District Manager: Wrathell, Hunt & Associates, LLC. (2008 – Present).

Palace at Coral Gables CDD, City of Coral Gables, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 243 independent and assisted living units, approximately 9,314 sf of retail space in the residential building and 3,654 sf in the parking, and 564 parking stalls (337 public and 227 private) on 2.5 acres. Client: The Palace Group CDD. District Manager: The Palace Management. (2008 – Present).

Trails at Monterey CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure. The infrastructure is a network of roadway, drainage, water and sanitary sewer systems on 92.47 acres. Client: Trails at Monterey CDD. District Manager: Special District Services, Inc. (2008 – Present).

Crestview West CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 114 single family units on 25.26 acres. Client: Crestview West CDD. District Manager: Special District Services, Inc. (2008 – Present).

Venetian Parc CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 604 residential units on 122 acres. Client: Venetian Parc CDD. District Manager: Special District Services, Inc. (2007 – Present).

Keys Edge CDD, Florida City, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 174 townhomes, 624 villas and 389 “zero lot line” residential units for a total of 1,187 dwelling units on 81.84 acres. Client: Keys Edge CDD. District Manager: Special District Services, Inc. (2007 – Present).

Century Gardens at Tamiami CDD, Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 844 residential units on 121 acres. Client: Century Gardens at Tamiami CDD. District Manager: Special District Services, Inc. (2007 – Present).

The Village at Gulfstream Park CDD, Broward County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 1,500 multi-family dwelling units, a hotel, 750,000 square feet of retail space, 140,000 square feet of office space, and a movie theater on 54.60 acres. Client: The Village at Gulfstream Park CDD. District Manager: PFM Group Consulting LLC. (2007 – Present).

Majorca Isles CDD, City of Miami Gardens, Miami-Dade County FL. District Engineer overseeing the development of the infrastructure that will give access and service to 594 single family dwelling units on 60.13 acres. Client: Majorca Isles CDD. District Manager: Governmental Management Services. (2007 – Present).

Coconut Cay CDD, City of Miami Gardens, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 543 single family dwelling units on 108 acres. Client: Coconut Cay CDD. District Manager: Governmental Management Services. (2007 – Present).

Enclave at Black Point Marina CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 240 single family units on 50.38 acres. Client: Enclave at Black Point Marina CDD. District Manager: Governmental Management Services. (2007 – Present).

Walnut Creek CDD, City of Hallandale, Broward County, FL. District

Engineer overseeing the development of the infrastructure that will give access and service to 759 single family dwellings and 153 villas/townhomes on 227 acres. Client: Walnut Creek CDD. District Manager: Special District Services, Inc. (2007 - 2012).

Downtown Doral CDD, City of Doral, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to construct 2,840 residential units, as well as 650,000 SF of retail and office space, and 100,000 SF of civic space dwelling units on 90.30 acres. Client: Downtown Doral CDD. District Manager: Governmental Management Services. (2006 – Present).

Grand Bay at Doral CDD, City of Doral, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 2,469 residential units, 148 units of workshop, and 1,489 rental units on 334.48 acres. Client: Grand Bay at Doral CDD. District Manager: Special District Services, Inc. (2006 – Present).

Century Gardens Village CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 272 dwellings on 38.25 acres of land. Client: Century Gardens Village CDD. District Manager: Special District Services, Inc. (2006 – Present).

Lake Frances CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 143 single family dwelling units on 47.89 acres of land. Client: Lake Frances CDD. District Manager: Special District Services, Inc. (2006 – Present).

Fontainebleau Lakes CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to construct 1,386 mid-rise condominium units, 238 courtyard units and 212 townhomes on 272.12 acres of land. Client: Fontainebleau Lakes CDD. District Manager: Special District Services, Inc. (2006 – Present).

South-Dade Venture CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 2,274 dwellings on 389 acres of land. Client: South Dade Venture CDD. District Manager: Governmental Management Services. (2006 – Present).

Coronado CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 327 condominium dwelling units on 17.41 acres of land. Client: Coronado CDD. District Manager: Special District Services, Inc. (2006 – Present).

Waterford Estates CDD, Charlotte County, FL. District engineer overseeing the development of the infrastructure that will give service to 211 single family units, 266 duplexes and 224 quadruplex dwellings on 193 acres of land. Client: Waterford Estates CDD. District Manager: Governmental Management Services. (2006 – Present).

Crestview II CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give service to 120 single family units on 30 acres of land. Client: Crestview II CDD. District Manager: Special District Services, Inc. (2005 – Present).

Keys Cove II CDD, City of Homestead, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 523 townhomes and 406 executive townhomes on 84 acres of land. Client: Keys Cove II CDD. District Manager: Special District Services, Inc. (2005 – Present).

Coral Keys Homes CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and

service to 614 residential units on 43.27 acres of land. Client: Coral Keys Homes CDD. District Manager: Governmental Management Services. (2005 – Present).

Landmark at Doral CDD, City of Doral, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 1,100 residential units, 94,700 SF of retail space, 93,346 SF of office and 180,000 SF of flex office space on 118 acres of land. Client: Landmark at Doral CDD. District Manager: Wrathell, Hunt & Associates, LLC. (2005 – Present).

Summerville CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 111 townhouses and 156 single family residences on 47.88 acres of land. Client: Summerville CDD. District Manager: Special District Services, Inc. (2004 – Present).

Islands at Doral Townhomes CDD, City of Doral, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 145 townhomes on 20 acres of land. Client: Islands at Doral Townhomes CDD. District Manager: Governmental Management Services. (2004 – Present).

Keys Cove CDD, City of Homestead, Miami-Dade County, FL. District engineer overseeing the development of the infrastructure that will give access and service to 398 villas and 576 courtyard condominiums on 72.41 acres of land. Client: Keys Cove CDD. District Manager: Special District Services, Inc. (2004 – Present).

Kendall Breeze West CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 208 townhouse units on 26.34 acres of land. Client: Kendall Breeze West CDD. District Manager: Special District Services, Inc. (2004 – Present).

Valencia Acres CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 144 single family dwelling units 63.89 acres of land. Client: Valencia Acres CDD. District Manager: Special District Services, Inc. (2004 – Present).

Bluewaters CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 246 single family dwelling units and 230 townhomes on 80 acres of land. Client: Bluewaters CDD. District Manager: Special District Services, Inc. (2003 – Present).

Cutler Cay CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 505 single family units 215.34 acres of land. Client: Cutler Cay CDD. District Manager: Special District Services, Inc. (2003 – Present).

Islands at Doral III CDD, City of Doral, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 771 three story garden dwelling units, 720 townhomes and 227 single family residences on 262 acres of land. Client: Islands at Doral III CDD. District Manager: Governmental Management Services. (2003 – Present).

Tree Island Estates CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 178 single family dwellings and 96 townhomes on 86 acres of land. Client: Tree Island Estates CDD. District Manager: Special District Services, Inc. (2003 – Present).

Islands at Doral NE CDD, City of Doral, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 66 single family dwellings, 125 townhomes and 340 condominium

residences on 71.70 acres of land. Client: Islands at Doral NE CDD. District Manager: Special District Services, Inc. (2003 – Present).

Century Gardens CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 330 family dwelling units on 76.11 acres of land. Client: Century Gardens CDD. District Manager: Special District Services, Inc. (2003 – Present).

Sausalito Bay CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 225 single family dwellings and 204 townhouses on 104 acres of land. Client: Sausalito Bay CDD. District Manager: Special District Services, Inc. (2002 – Present).

Islands at Doral SW CDD, City of Doral, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 101 single family dwellings and 563 townhouses on 108 acres of land. Client: Islands at Doral SW CDD. District Manager: Special District Services, Inc. (2002 – Present).

Venetian Isles CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 358 single family dwellings and 216 townhouses on 127.52 acres of land. Client: Venetian Isles CDD. District Manager: Special District Services, Inc. (2002 – Present).

Pentathlon CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 514 single family dwellings on 95.12 acres of land. Client: Pentathlon CDD. District Manager: Special District Services, Inc. (2002 – Present).

Kendall Breeze CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 129 single family dwellings and 650 townhouses on 90 acres of land. Client: Kendall Breeze CDD. District Manager: Special District Services, Inc. (2002 – Present).

Beacon Lakes CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to the industrial and commercial buildings on 478 acres of land. Client: Beacon Lakes CDD. District Manager: Inframark Infrastructure Management Services. (2002 – Present).

Century Parc CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 692 condominium units and 74 townhomes on 48 acres of land. Client: Century Parc CDD. District Manager: Special District Services, Inc. (2001 – Present).

Beacon Tradeport CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to industrial and commercial buildings within the development on 377 acres of land. Client: Beacon Tradeport CDD. District Manager: Governmental Management Services (1998 – Present).

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT*(Complete one Section E for each key person.)*

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Raul E. Alessandri, P.E.	Senior Civil Engineer	35	24
15. FIRM NAME AND LOCATION <i>(City and State)</i>			
Alvarez Engineers, Inc. (City of Doral, FL)			
16. EDUCATION <i>(Degree and Specialization)</i>		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i>	
B. S. School of Engineering and Applied Science Masters Business Administration		Florida Professional Engineer #75506	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i>			
American Society of Civil Engineers; National Society of Professional Engineers; Florida Engineering Society; MOT / TTC Advanced Certification			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
SR-860 / Miami Gardens Dr. at Biscayne Blvd., (City of Miami Gardens, Miami Dade County, FL)	2018	
a. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Intersection Safety Improvement project including horizontal alignment correction along Miami Gardens Drive, milling and resurfacing, addition of a pedestrian crosswalk, replacement of one traffic signal structure and addition of back plates, modification of lighting, and signing and pavement marking. Responsibilities: design of roadway, signing and pavement marking, signalization and lighting. Client: FDOT D6, Cost: \$ 805,632 / 2016- 2018.		
SR-5 / SE 2nd Ave., from SE 2nd St. to SE 4th St.	2017	
b. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm RRR and safety project for a 3-lane urban roadway; compliance with ADA accessibility standards. Design of roadway, signing and pavement marking, signalization and lighting / Construction Cost: \$1,701,482 (estimated) Role: Lighting and Signalization Engineer of Record Professional Services: 2014 - 2017		
SR-932 / NW 103 St. / W 49th St., from W 12th Ave. to E 5th Ave (City of Hialeah, FL)	2016	
c. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Safety improvement project, for a 2.24 mile, 6-lane divided urban principal arterial with three lanes in each direction. Design of roadway, SPM and signalization / Construction Cost: \$728,967 (estimated) Role: Project Manager and Engineer of Record Professional Services: 2015 - 2016		
SR-5 / US-1 / S. Dixie Hwy., from C-100A Canal to SW 100 St. (Miami Dade County, FL)	2015	
d. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Intersection safety project to improve the horizontal alignment for 0.5 mile of US-1 and create an auxiliary lane on the NB direction. Design of roadway, SPM, signalization and lighting. Construction cost: \$2,635,893 (estimated) Role: Project Manager and Engineer of Record Professional Services: 12/2013 – 2015		
SR-5 / US-1 / Ovs. Hwy. from W. of Indies Dr. (MM 27.4) to W. of Ships Way (MM 29.5) / (Monroe County, FL)	2013	2015
e. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Restoration, Rehabilitation and Resurfacing of a 2-lane, 2 mile undivided rural road. Design of roadway and signing and pavement markings. Construction Cost: \$1,483,128 Role: Project Engineer Professional Services: 2011 - 2013		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT*(Complete one Section E for each key person.)*

12. NAME Reynaldo Chinae, P.E.	13. ROLE IN THIS CONTRACT Senior Civil Engineer	14. YEARS EXPERIENCE	
		a. TOTAL 35	b. WITH CURRENT FIRM 24
15. FIRM NAME AND LOCATION <i>(City and State)</i> Alvarez Engineers, Inc. (City of Doral, FL)			
16. EDUCATION <i>(Degree and Specialization)</i> B.S. in Civil Engineering M.S. in Regional Development and Population		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Florida Professional Engineer #58579	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i> The Irrigation Association; Colegio Cubano de Ingeniero Agrónomos; MOT / TTC Advanced Certification			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i> Downtown Doral CDD (City of Doral, Florida)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES On going	CONSTRUCTION <i>(If applicable)</i>
a. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure of Downtown Doral, a 90.3 acre commercial and residential development. / Estimated Cost: \$42,405,843 Role: Senior Civil Engineer / Professional services: 2006 - present		
(1) TITLE AND LOCATION <i>(City and State)</i> Hollywood Beach CDD 1 (City of Hollywood Beach, FL)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES On going	CONSTRUCTION <i>(If applicable)</i>
b. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm The District was established for the purpose of financing, acquiring or constructing, maintaining and operating the public portion of the parking garage, which is part of the infrastructure necessary to support the Project. It covers 5.13 acres, includes a 17-story, 347 guest room hotel building with a public and guest parking garage / Estimated Cost: \$28,395,000 Role: Senior Civil Engineer / Professional services: 2011 - present		
(1) TITLE AND LOCATION <i>(City and State)</i> Islands at Doral III CDD (City of Doral, FL)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES On going	CONSTRUCTION <i>(If applicable)</i>
c. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure of Islands at Doral III, a 262 acre residential development. Estimated Cost: \$27,741,113 Role: Senior Civil Engineer / Professional services: 2003 - present		
(1) TITLE AND LOCATION <i>(City and State)</i> Century Gardens at Tamiami CDD (Miami-Dade County, FL)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES On going	CONSTRUCTION <i>(If applicable)</i>
d. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Century Gardens at Tamiami, a 121 acre residential development. Estimated Cost: \$22,272,000 Role: Senior Civil Engineer / Professional services: 2007 - present		
(1) TITLE AND LOCATION <i>(City and State)</i> Crestview West CDD (Miami-Dade County, FL)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES On going	CONSTRUCTION <i>(If applicable)</i>
e. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm The Crestview West Community Development District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Crestview West, a 25.26 acre residential development. / Estimated Cost: \$4,114,740 Role: Senior Civil Engineer / Professional services: 2008 - present		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT*(Complete one Section E for each key person.)*

12. NAME Ramon Tesone, P.E., PTOE	13. ROLE IN THIS CONTRACT Senior Civil Engineer	14. YEARS EXPERIENCE	
		a. TOTAL 24	b. WITH CURRENT FIRM 19
15. FIRM NAME AND LOCATION <i>(City and State)</i> Alvarez Engineers, Inc. (City of Doral, FL)			
16. EDUCATION <i>(Degree and Specialization)</i> B.S. in Civil Engineering		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Florida Professional Engineer # 56070 PTOE # 2803	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i> Professional Traffic Operations Engineer Certification; MOT / TTC Advanced Certification			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i> SR-A1A/ Indian Creek Drive from Abbott Ave to 63 Street (0.6 miles), (Miami Beach, FL)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2019	CONSTRUCTION <i>(If applicable)</i>
a. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input type="checkbox"/> Check if project performed with current firm Pavement rehabilitation project that consisted of milling and resurfacing, reconstruction of existing substandard pedestrian ramps, upgrade of three signalized intersections with video detection and provision of full pedestrian actuation, and signing and pavement marking improvements. Role: Engineer of Record for the Roadway and Signalization.		
(1) TITLE AND LOCATION <i>(City and State)</i> SR 973 / NW 87 Ave at NW 7 Street (0.3 miles), MDC, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2018	CONSTRUCTION <i>(If applicable)</i>
b. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input type="checkbox"/> Check if project performed with current firm Safety project to widen NW 87th Ave to provide an auxiliary right turn lane to NW 7 St. The project also included providing drainage French drains, replacement of mast arms at two intersections and signing and pavement marking improvements. Role: Engineer of Record for the Roadway, Drainage and Signing and Pavement Markings.		
(1) TITLE AND LOCATION <i>(City and State)</i> SR 826 / Palmetto Expressway Ramps and Frontage Road (1.3 miles), MDC, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2018	CONSTRUCTION <i>(If applicable)</i>
c. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input type="checkbox"/> Check if project performed with current firm RRR project to rehabilitate five ramps and a frontage road on the SR 826 system. The project included roadway resurfacing, shoulder widening, providing a bicycle lane along the frontage road, and miscellaneous drainage, signalization and signing and pavement markings improvements. Role: Engineer of Record for the Roadway, Drainage, SPM and Signalization improvements.		
(1) TITLE AND LOCATION <i>(City and State)</i> SR-959 / SW 57 Ave., from SW 24 St. to SW 8 St. (1.1 miles), MDC, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2010	CONSTRUCTION <i>(If applicable)</i>
d. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input type="checkbox"/> Check if project performed with current firm widening project from 2 lanes to 3 lanes which includes sidewalk reconstruction, drainage improvements, signing and pavement markings, signalization and lighting improvements. The lighting included installation of a new lighting system with decorative poles. Role: Engineer of Record for the Signalization and Lighting improvements.		
(1) TITLE AND LOCATION <i>(City and State)</i> SR 9 / NW 27 Ave from N. of NW 141 St. to I-95 Park & Ride On-Ramp (2.1 miles), MDC, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2013	CONSTRUCTION <i>(If applicable)</i>
e. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Resurfacing project of a 4-lane divided arterial which included cross slope correction, addition of bicycle lanes, ADA improvements, signalization, lighting and upgrades to bridge railings. Role: Engineer of Record (EOR) for the Roadway, SPM, Lighting and Signalization.		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT*(Complete one Section E for each key person.)*

12. NAME Maria Tovar- Altimari, E.I.	13. ROLE IN THIS CONTRACT Civil Engineer	14. YEARS EXPERIENCE	
		a. TOTAL 12	b. WITH CURRENT FIRM 12
15. FIRM NAME AND LOCATION <i>(City and State)</i> Alvarez Engineers, Inc. (City of Doral, FL)			
16. EDUCATION <i>(Degree and Specialization)</i> B.S. in Civil Engineering		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i>	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i> MOT / TTC Advanced Certification			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
SR-932 / NW 103 St. / W. 49 St., from W. 12 Ave. to E 5 Ave. (Miami-Dade County, FL)	2017	
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm a. Scope: Safety improvement project, for a 2.24 mile, 6-lane divided urban principal arterial with three lanes in each direction. Design of roadway, SPM and signalization. / Construction Cost: \$728,967 (estimated) Role: Engineering Technician responsible for the design of roadway signing and pavement marking Professional Services: 2015 - Present		
SR-5 / US-1 / S. Dixie Hwy. at SR-9 / SW 27 Ave. (Miami-Dade County, FL)	2014	2015
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm b. Scope: Intersection improvements on a 6-lane divided urban road including roadway resurfacing, pavement widening, cross slope correction, roadside safety improvement, signing and pavement marking, signalization upgrades per safety. Construction Cost: \$1,061,110 Role: Engineering Technician preparing report and performed QAQC / Professional Services: 2012 - 2014		
SR-5 / US-1 / S. Dixie Hwy., from C-100A Canal to SW 100 St. (Miami-Dade County, FL)	2015	
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm c. Scope: Intersection safety project to improve the horizontal alignment of US-1 and create an auxiliary lane on the NB direction. Design of roadway, SPM, signalization and lighting. / Construction Cost: \$2,635,893 (estimated). Role: Engineering Technician responsible for the design of signing and for QAQC / Professional Services: 2013-2015		
SR-994 / SW 186 St., from E. of SR-821 Florida's Turnpike to W. of SR-5/US1/S. Dixie / (Miami-Dade County, FL)	2014	2015
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm d. Scope: Ride rehabilitation project with ADA improvements and utility adjustments for a 5-lane 1 mile undivided roadway. Construction Cost: \$485,546 Role: Engineering Technician responsible for QAQC/ Professional Services: 2012 - 2014		
SR-9 / NW 27th Ave., from NW 141st St. to I-95 On-Ramp (Miami-Dade County, FL)	2014	2015
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm e. Scope: Resurfacing project for a 4-lane 2.1 mile divided roadway; design included roadway, signing and pavement marking, signalization and lighting. / Construction Cost: \$2,431,819 Role: Engineering Technician responsible for QAQC / Professional Services: 2012 - 2014		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT*(Complete one Section E for each key person.)*

12. NAME Angel Camacho, E.I.	13. ROLE IN THIS CONTRACT Electrical Engineer	14. YEARS EXPERIENCE	
		a. TOTAL 5	b. WITH CURRENT FIRM 5
15. FIRM NAME AND LOCATION <i>(City and State)</i> Alvarez Engineers, Inc. (City of Doral, FL)			
16. EDUCATION <i>(Degree and Specialization)</i> B.S. in Electrical Engineering M.A. in Engineering Management		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i>	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i>			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i> NW 122 Ave., from NW 25 St. to NW 41 St. (1.0 mile), Miami Dade County, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2018	CONSTRUCTION <i>(If applicable)</i>
a. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Scope: Construction of a new urban 2-lane road. Shop drawing review and approval. Responsibilities: review of shop drawings, inspections, permit coordination, utility coordination, responded to request for information, coordinated and performed inspections, design of fencing plan per FDOT specs, maintenance coordination. Role: Engineering Technician. Design Dates: 06/2018 – Present. <input checked="" type="checkbox"/> Check if project performed with current firm		
(1) TITLE AND LOCATION <i>(City and State)</i> SR-A1A / Collins Ave. at 79 St., City of Miami Beach, Miami Dade County, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2019	CONSTRUCTION <i>(If applicable)</i>
b. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Scope: Intersection Safety Improvement project to add crosswalks and a signal. Design of roadway, SPM and signalization. Responsibilities: design of signalization. Role: Engineering Technician. Design Dates: 10/2017 – 01/2019. <input checked="" type="checkbox"/> Check if project performed with current firm		
(1) TITLE AND LOCATION <i>(City and State)</i> SR-5 / S. Dixie Hwy. at SW 127 Ave./SW 232 St. (0.14 mile), Miami Dade County, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2019	CONSTRUCTION <i>(If applicable)</i>
c. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Scope: Intersection safety improvements including milling and resurfacing, modification of traffic separator, replacement of one traffic signal structure and addition of signal back plates. Responsibilities: design of signalization: addition of new loop window and pull boxes, update of runs for conduits, and relocation of existing lighting conduit in conflict with new location of mast arm. Client: FDOT D6, Role: Engineering Technician. Design Dates: 2/2017 – 01/2019. <input checked="" type="checkbox"/> Check if project performed with current firm		
(1) TITLE AND LOCATION <i>(City and State)</i> SR-817 / NW 27 Ave. from NW 171 St. to NW 177 St. (0.38 mile), Miami Dade County, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2018	CONSTRUCTION <i>(If applicable)</i>
d. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Scope: Pedestrian safety improvement project. Design of roadway, SPM, signalization and lighting. Responsibilities: post design: revision for relocation mast arm. Client: FDOT D6. Design Dates: 12/2015 – 07/2017. Post Design services in 2018. Role: Engineering Technician. <input checked="" type="checkbox"/> Check if project performed with current firm		
(1) TITLE AND LOCATION <i>(City and State)</i> SR-5 / US-1 / S. Dixie Hwy., from C-100A Canal to SW 100 St. (0.5 mile), Miami Dade County, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2018	CONSTRUCTION <i>(If applicable)</i>
e. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Scope: Intersection safety project to improve the horizontal alignment of US-1 and create an auxiliary lane on the NB direction. Design of roadway, SPM, signalization and lighting. Responsibilities: post design: revision of plans; field reviews for RFIs and location pull boxes for video camera; addition of video detection camera and zones, and blue toad to signalization plans. Client: FDOT D6, Design Dates: 12/2013 – 12/2016. Role: post design: Engineering Technician. <input checked="" type="checkbox"/> Check if project performed with current firm		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT*(Complete one Section E for each key person.)*

12. NAME Edin Palmar, E.I.	13. ROLE IN THIS CONTRACT Civil Engineer	14. YEARS EXPERIENCE	
		a. TOTAL 3	b. WITH CURRENT FIRM 3
15. FIRM NAME AND LOCATION <i>(City and State)</i> Alvarez Engineers, Inc. (City of Doral, FL)			
16. EDUCATION <i>(Degree and Specialization)</i> B.S. Civil Engineering		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i>	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i>			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i> Kendall Breeze CDD (Miami-Dade County, FL)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES On going	CONSTRUCTION <i>(If applicable)</i>
a. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm The District was created for the purpose purpose of financing and managing the acquisition, construction and maintenance of the infrastructure of Kendall Breeze, a 90 acre residential development / Estimated Cost: \$5,866,000 Professional services: 2002 - present Role: Civil Engineer		
(1) TITLE AND LOCATION <i>(City and State)</i> South Kendall CDD (Miami-Dade County, FL)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES On going	CONSTRUCTION <i>(If applicable)</i>
b. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm The District was created for the purpose purpose of financing and managing the acquisition, construction and maintenance of the infrastructure of South Kendall, a 54.3 acre residential development / Estimated Cost: \$10,805,000 Professional services: 2013 - present Role: Civil Engineer		
(1) TITLE AND LOCATION <i>(City and State)</i> NW 105 St and NW 112 Ave (Miami-Dade County, FL)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES On going	CONSTRUCTION <i>(If applicable)</i>
c. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Design of new signalized intersection at NW 105 St and NW 112 Ave. Project included milling and resurfacing, construction of pedestrian ramps, signing and pavement markings and signalization Professional services: 2020 - present Role: Civil Engineer		
(1) TITLE AND LOCATION <i>(City and State)</i> SW 320 St and SW 162 Ave (Miami-Dade County, FL)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES On going	CONSTRUCTION <i>(If applicable)</i>
d. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Design of new signalized intersection at SW 320 St and SW 162 Ave. Project included milling and resurfacing, roadway widening to accommodate a left turn bay, signing and pavement markings and signalization. Professional services: 2020 - present Role: Civil Engineer		
(1) TITLE AND LOCATION <i>(City and State)</i> SW 344 St and SW 13 Ave (Miami-Dade County, FL)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES On going	CONSTRUCTION <i>(If applicable)</i>
e. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Design of new signalized intersection for the roundabout. Project included milling and resurfacing, roadway widening to accommodate a left turn bay, and signing and pavement markings. Responsibilities: Design of roadway, signing and pavement markings. Professional services: 04/2019 – Present / Role: Civil Engineer		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT*(Complete one Section E for each key person.)*

12. NAME Katherine Ramirez	13. ROLE IN THIS CONTRACT Engineer	14. YEARS EXPERIENCE	
		a. TOTAL 4	b. WITH CURRENT FIRM 1
15. FIRM NAME AND LOCATION <i>(City and State)</i> Alvarez Engineers, Inc. (City of Doral, FL)			
16. EDUCATION <i>(Degree and Specialization)</i> B.S. in Petroleum Engineering		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i>	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i>			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
Century Gardens at Tamiami CDD (Miami-Dade County, FL)	On going	
a. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Century Gardens at Tamiami, a 121 acre residential development. Estimated Cost: \$22,272,000 Role: Civil Engineer / Professional services: 2022 - present		
Islands at Doral III CDD (City of Doral, FL)	On going	
b. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure of Islands at Doral III, a 262 acre residential development. Estimated Cost: \$27,741,113 Role: Civil Engineer / Professional services: 2022 - present		
Cutler Cay CDD (Miami-Dade County, FL)	On going	
c. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure of Cutler Cay, a 215.34 acre residential development. Estimated Cost: \$13,580,000 Role: Civil Engineer / Professional services: 2022 - present		
Kendall Breeze CDD (Miami-Dade County)	On going	
d. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm The CDD was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Kendall Breeze, a 90 acre residential development. Estimated Cost: \$5,866,000 Role: Civil Engineer / Professional services: 2022 - present		
Century Parc CDD (Miami-Dade County, FL)	On going	
e. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm The CDD was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Century Parc, a 48 acre residential development. Estimated Cost: \$5,449,000 Role: Civil Engineer / Professional services: 2022 - present		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT*(Complete one Section E for each key person.)*

12. NAME Carlos Castaneira	13. ROLE IN THIS CONTRACT Designer and CADD Operator	14. YEARS EXPERIENCE	
		a. TOTAL 35	b. WITH CURRENT FIRM 13
15. FIRM NAME AND LOCATION <i>(City and State)</i> Alvarez Engineers, Inc. (City of Doral, FL)			
16. EDUCATION <i>(Degree and Specialization)</i> A.A. in Architecture		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i>	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i>			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i> NW 110 Ave at NW 14 St. and NW 17 St. (0.72 mile) (City of Sweetwater, FL)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2019	CONSTRUCTION <i>(If applicable)</i>
a. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Scope: Roadway construction project including environmental, road compaction, widening, bike lanes, sidewalks, curb and gutter, continuous storm drain system, water and sewer, signing and pavement marking, lighting and landscape. Responsibilities: design of roadway, SPM, lighting and W&S plans. Client: Beacon Tradeport CDD. Role: Senior CAD Designer. Estimated cost: \$2M.		
(1) TITLE AND LOCATION <i>(City and State)</i> NE 16 Ave. Corridor, from NE 123 St. to NE 35 St. (Miami-Dade County, FL)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2016	CONSTRUCTION <i>(If applicable)</i>
b. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Scope: Reconstruction of a 2-lane 0.76 mile roadway, which includes striped center turn lane, sidewalks, curb & gutter, bike lanes, continuous storm drainage system, pavement markings and signage, signal modifications, landscaping. Estimated construction cost: \$3.6M Role: Designer and CADD Operator		
(1) TITLE AND LOCATION <i>(City and State)</i> SR-5 / US-1 / S. Dixie Hwy., from C-100A Canal to SW 100th St. (Miami-Dade County, FL)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2016	CONSTRUCTION <i>(If applicable)</i>
c. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Scope: Intersection safety project to improve the horizontal alignment of US-1 and create an auxiliary lane on the NB direction. Design of roadway, SPM, signalization and lighting Estimated construction cost: \$2.6M Role: Designer and CADD Operator		
(1) TITLE AND LOCATION <i>(City and State)</i> SR-5 / US-1 / S. Dixie Hwy. at SR-9 / SW 27th Ave. (Miami-Dade County, FL)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2014	CONSTRUCTION <i>(If applicable)</i> 2015
d. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Scope: Intersection improvements on a 6-lane divided urban road including roadway resurfacing, pavement widening, cross slope correction, roadside safety improvement, signing and pavement marking, signalization upgrades per safety. Estimated construction cost: \$1.0M Role: Designer and CADD Operator		
(1) TITLE AND LOCATION <i>(City and State)</i> SR-5 / US-1 / S. Dixie at SW 211 St. / SW 117 Ave. (Miami-Dade County, FL)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2014	CONSTRUCTION <i>(If applicable)</i> 2015
e. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm Scope: Intersection Safety improvements project, design of roadway, signing and pavement marking, signalization and lighting. Design of roadway, SPM, signalization and lighting Estimated construction Cost: \$264,539 Role: Designer and CADD Operator		

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER <p style="text-align: center; font-size: 24pt;">1</p>
21. TITLE AND LOCATION <i>(City and State)</i> Grand Bay at Doral Community Development District (City of Doral, Miami-Dade County, FL)	22. YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION <i>(If applicable)</i>	

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Grand Bay at Doral CDD	b. POINT OF CONTACT NAME Armando Silva, SDS Inc.	c. POINT OF CONTACT TELEPHONE NUMBER (561) 630-4922
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

The Grand Bay at Doral Community Development District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Grand Bay at Doral, a 334 acre residential development located in the City of Doral in Miami-Dade County, Florida. The development offers single family dwellings and includes 3 phases.

The infrastructure is a network of roadway, drainage, water and sanitary sewer systems that will give access and service to 2,469 residential units, 148 units of workshop, and 1,489 rental units.

Estimated Cost: \$ 168,600,000

District Engineer currently overseeing the development of the infrastructure (2006 to present).



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Alvarez Engineers, Inc.	(2) FIRM LOCATION <i>(City and State)</i> 8935 NW 35 Lane, Suite 101 Doral, Florida	(3) ROLE CDD District Engineer
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER <p style="text-align: center; font-size: 24pt;">2</p>
21. TITLE AND LOCATION <i>(City and State)</i> Fontainebleau Lakes Community Development District (Miami-Dade County, FL)		22. YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION <i>(If applicable)</i>

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Fontainebleau Lakes CDD	b. POINT OF CONTACT NAME Armando Silva, SDS Inc.	c. POINT OF CONTACT TELEPHONE NUMBER (561) 630-4922
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

District Engineer currently overseeing the development of the infrastructure.

The Fontainebleau Lakes Community Development District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Fontainebleau Lakes, a 272 acre residential development located in Miami-Dade County, Florida. The development offers mid-rise condominium units, courtyard units and townhomes.

The infrastructure is a network of roadway, stormwater management, water and sanitary sewer systems that will give access and service to construct 1,386 mid-rise condominium units, 238 courtyard units and 212 townhomes.

Estimated Cost: \$ 104,323,000



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Alvarez Engineers, Inc.	(2) FIRM LOCATION <i>(City and State)</i> 8935 NW 35 Lane, Suite 101 Doral, Florida	(3) ROLE CDD District Engineer
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER <p style="text-align: center; font-size: 24pt;">3</p>
21. TITLE AND LOCATION <i>(City and State)</i> Lakes by the Bay South Community Development District (Miami-Dade County, FL)	22. YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION <i>(If applicable)</i>	

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Lakes by the Bay South CDD	b. POINT OF CONTACT NAME Luis Hernandez, GMS-SF, LLC	c. POINT OF CONTACT TELEPHONE NUMBER (954) 721-8681
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT <i>(Include scope, size, and cost)</i>		

The Lakes by the Bay South Community Development District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Lakes by the Bay South, a 516.54 acre residential development located in Miami-Dade County, Florida.

The infrastructure is a network of roadway, drainage, water and sanitary sewer systems that will give access and service to residential units.

Estimated Cost: \$ 99,416,450

District Engineer currently overseeing the development of the infrastructure (2015 to present).



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Alvarez Engineers, Inc.	(2) FIRM LOCATION <i>(City and State)</i> 8935 NW 35 Lane, Suite 101 Doral, Florida	(3) ROLE CDD District Engineer
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER <div style="text-align: center; font-size: 24pt;">4</div>
21. TITLE AND LOCATION <i>(City and State)</i> Downtown Doral South Community Development District (City of Doral, Miami-Dade County, FL)		22. YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION <i>(If applicable)</i>

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Downtown Doral South CDD	b. POINT OF CONTACT NAME Rich Hans, GMS-SF, LLC	c. POINT OF CONTACT TELEPHONE NUMBER (954) 721-8681
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

The Downtown Doral South Community Development District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure of Downtown Doral, a 129.93 acre residential and a 6.54-acre commercial tract development located in the City of Doral, Miami-Dade County, Florida.

The infrastructure is a network of roadway, stormwater management, water and sanitary sewer systems that will give access and service to 343 single family units, 557 townhomes and 398 multi-family units for a total of 1,298 residential units, and a commercial development.

Estimated Cost: \$ 99,210,955.

District Engineer currently overseeing the development of the infrastructure (2016 to present).



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
a. Alvarez Engineers, Inc.	8935 NW 35 Lane, Suite 101 Doral, Florida	CDD District Engineer
b.		
c.		
d.		
e.		
f.		

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 5
21. TITLE AND LOCATION <i>(City and State)</i> Midtown Miami Community Development District (City of Miami, Miami-Dade County, FL)		22. YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION <i>(If applicable)</i>

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Midtown Miami CDD	b. POINT OF CONTACT NAME Greg Wrathell, Wrathell, Hunt & Associates	c. POINT OF CONTACT TELEPHONE NUMBER (561) 571-0010
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT <i>(Include scope, size, and cost)</i>		

District Engineer currently overseeing the development of the infrastructure.

The District financed the construction of a network of roadways within the boundaries of the District as well as improvements to offsite roads adjacent to the development. The District also financed portions of three public garages, water and sanitary sewer systems, stormwater management systems, landscaping, streetscaping, irrigation, a public plaza and miscellaneous public improvements, such as utility undergrounding and signalization for a 56 acre development located in the city of Miami, Miami-Dade County, Florida. The 56 gross acres include residential and commercial areas.

The infrastructure is a network of roadway, stormwater management, sanitary sewer, and water systems that will give access and service to the industrial and commercial buildings within the development.

Estimated Cost: \$ 77,535,000



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a. (1) FIRM NAME Alvarez Engineers, Inc.	(2) FIRM LOCATION <i>(City and State)</i> 8935 NW 35 Lane, Suite 101 Doral, Florida	(3) ROLE CDD District Engineer
b. (1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c. (1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d. (1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e. (1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f. (1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER <p style="text-align: center; font-size: 24pt;">6</p>
21. TITLE AND LOCATION <i>(City and State)</i> Landmark at Doral Community Development District (City of Doral, Miami-Dade County, FL)		22. YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION <i>(If applicable)</i>

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Landmark at Doral CDD	b. POINT OF CONTACT NAME Craig Wrathell, Wrathell, Hunt & Associates	c. POINT OF CONTACT TELEPHONE NUMBER (561) 571-0010
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT <i>(Include scope, size, and cost)</i>		

The Landmark at Doral Community Development District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure of Landmark at Doral, a 118 acre mixed use development located in the City of Doral, Miami-Dade County, Florida. The development offers residential, retail, office and industrial uses.

The infrastructure is a network of roadway, parking garage, drainage, water, sanitary sewer systems and outdoor recreational areas that will give access and service to 1,100 residential units, 94,700 SF of retail space, 93,346 SF of office and 180,000 SF of flex office space.

Estimated Cost: \$ 75,000,000

District Engineer currently overseeing the development of the infrastructure (2005 to present).



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Alvarez Engineers, Inc.	(2) FIRM LOCATION <i>(City and State)</i> 8935 NW 35 Lane, Suite 101 Doral, Florida	(3) ROLE CDD District Engineer
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER <p style="text-align: center; font-size: 24pt;">7</p>
21. TITLE AND LOCATION <i>(City and State)</i> Two Lakes Community Development District (City of Hialeah, Miami-Dade County, FL)		22. YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION <i>(If applicable)</i>

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Two Lakes CDD	b. POINT OF CONTACT NAME Armando Silva, SDS Inc.	c. POINT OF CONTACT TELEPHONE NUMBER (561) 630-4922
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

The Two Lakes Community Development District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Two Lakes, a 221.58 acre residential development located in the City of Hialeah, Miami-Dade County, Florida.

The infrastructure is a network of roadway, drainage, water and sanitary sewer systems that will give access and service to 396 single family homes and 1,273 townhomes and villas.

Estimated Cost: \$ 66,541,617

District Engineer currently overseeing the development of the infrastructure (2016 to present).



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Alvarez Engineers, Inc.	(2) FIRM LOCATION <i>(City and State)</i> 8935 NW 35 Lane, Suite 101 Doral, Florida	(3) ROLE CDD District Engineer
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER <p style="text-align: center; font-size: 24pt;">8</p>
21. TITLE AND LOCATION <i>(City and State)</i> Beacon Lakes Community Development District (Miami-Dade County, FL)	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i> 2019

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Beacon Lakes CDD	b. POINT OF CONTACT NAME Ken Cassell, Inframark	c. POINT OF CONTACT TELEPHONE NUMBER (954) 753-5841
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT <i>(Include scope, size, and cost)</i>		

The Beacon Lakes Community Development District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure for a 522 acre development located in Northwest Miami-Dade County, Florida. The infrastructure is a network of roadway, stormwater management, sanitary sewer, and water systems that will give access and service to the industrial and commercial area.

Estimated Cost: \$ 63,000,000

District Engineer currently overseeing the development of the infrastructure (2002 to present).



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Alvarez Engineers, Inc.	(2) FIRM LOCATION <i>(City and State)</i> 8935 NW 35 Lane, Suite 101 Doral, Florida	(3) ROLE CDD District Engineer
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER <div style="text-align: center; font-size: 24pt;">9</div>
21. TITLE AND LOCATION <i>(City and State)</i> Griffin Lakes Community Development District (City of Dania Beach, Broward County, FL)		22. YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION <i>(If applicable)</i>

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Griffin Lakes CDD	b. POINT OF CONTACT NAME Rich Hans, GMS SFL	c. POINT OF CONTACT TELEPHONE NUMBER (954) 721-8681
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

The Griffin Lakes Community Development District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure of Griffin Lakes, a 33.62 acre residential development located in the City of Dania Beach, Broward County, Florida.

The infrastructure is a network of roadway, stormwater management, water and sanitary sewer systems that will give access and service to 427 townhouse residences.

Estimated Cost: \$ 6,914,273.

District Engineer currently overseeing the development of the infrastructure (2021 to present).



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Alvarez Engineers, Inc.	(2) FIRM LOCATION <i>(City and State)</i> 8935 NW 35 Lane, Suite 101 Doral, Florida	(3) ROLE CDD District Engineer
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

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

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Oakridge CDD	b. POINT OF CONTACT NAME Rich Hans, GMS SFL	c. POINT OF CONTACT TELEPHONE NUMBER (954) 721-8681
----------------------------------	--	--

24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

The Oakridge Community Development District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Oakridge, a 275.42 acre residential development located in City of Hollywood, Broward County, Florida.

The infrastructure is a network of roadway, drainage, water and sanitary sewer systems that will give access and service to 117 residential units.

Estimated Cost: \$ 3,185,686

District Engineer currently overseeing the development of the infrastructure (2016 to present).



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Alvarez Engineers, Inc.	(2) FIRM LOCATION <i>(City and State)</i> 8935 NW 35 Lane, Suite 101 Doral, Florida	(3) ROLE CDD District Engineer
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

G. KEY PERSONNEL PARTICIPATION IN EXAMPLE PROJECTS

26. NAMES OF KEY PERSONNEL <i>(From Section E, Block 12)</i>	27. ROLE IN THIS CONTRACT <i>(From Section E, Block 13)</i>	28. EXAMPLE PROJECTS LISTED IN SECTION F <i>(Fill in "Example Projects Key" section below before completing table. Place "X" under project key number for participation in same or similar role.)</i>									
		1	2	3	4	5	6	7	8	9	10
Juan R. Alvarez, P.E.	District Engineer	X	X	X	X	X	X	X	X	X	X
Raul Alessandri, P.E.	Senior Civil Engineer					X					
Reynaldo China, P.E.	Senior Civil Engineer	X	X	X	X	X	X	X	X	X	X
Ramon Tesone, P.E., PTOE	Senior Civil Engineer					X					
Angel Camacho, E.I.	Electrical Engineer					X	X		X	X	X
Maria Tovar-Altimari, E.I.	Civil Engineer										
Edin Palmar, E.I.	Civil Engineer										
Katherine Ramirez	Engineer	X	X	X	X	X	X	X	X	X	X
Carlos Castaneira	CADD Designer	X	X	X	X	X	X	X	X	X	X

29. EXAMPLE PROJECTS KEY

NUMBER	TITLE OF EXAMPLE PROJECT <i>(From Section F)</i>	NUMBER	TITLE OF EXAMPLE PROJECT <i>(From Section F)</i>
1	Grand Bay at Doral CDD	6	Landmark at Doral CDD
2	Fontainebleau Lakes CDD	7	Two Lakes CDD
3	Lakes by the Bay South CDD	8	Beacon Lakes CDD
4	Downtown Doral South CDD	9	Griffin Lakes CDD
5	Midtown Miami CDD	10	Oakridge CDD

H. ADDITIONAL INFORMATION

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

Alvarez Engineers, Inc. is a Civil Engineering Consulting Firm specializing in Land Development, Highway Design, Drainage, Stormwater Management, Environmental Permits, Signing & Pavement Markings, Signalization, and Lighting.

Established in 1995 by Juan R. Alvarez, P.E., Alvarez Engineers is a Florida corporation organized in Miami-Dade, Florida with offices in the City of Doral. We pride ourselves in being highly qualified, efficient, flexible and with a focus on teamwork. Since our inception we have experienced continued success with state and local government agencies and private sector businesses covering well over 100,000 acres of land. Alvarez Engineers has built strong professional relationships through a company-wide commitment to excellence, professional integrity and focus on our clients' needs.

Since 1998 our firm has been Engineering Consultant to over 70 Community Development Districts in Miami-Dade County which have issued more than \$1.4 Billion in bonds for financing public infrastructure to serve over 50,000 homes.

We are able to engage and complete major projects due to the high level of preparation of our staff, its diligence, work discipline, and most importantly, its capacity to work with other firms by paying special attention to interpersonal relationships with co-workers and members of the team.

Areas of Expertise:

- (1) Site Development and Parking Lot Design
- (2) Water Distribution and Sanitary Sewage Collection
- (3) Minor and Major Highway Design
- (4) Roadway Signing, Pavement Marking and Channelization
- (5) Roadway Lighting
- (6) Roadway Signalization
- (7) General Civil Engineering for planning and conceptual studies, permitting and construction administration

Insurance:

Alvarez Engineers' current General Liability insurance is at \$2,000,000 and current Professional Liability insurance is at \$2,000,000.

Business Ethics:

Alvarez Engineers adheres to the highest standards of business ethics and has never been the subject of a judicial investigation.

I. AUTHORIZED REPRESENTATIVE

The foregoing is a statement of facts.

31. SIGNATURE

DocuSigned by:



91E21FBBCEDD4E0...

32. DATE

3/3/2023

33. NAME AND TITLE

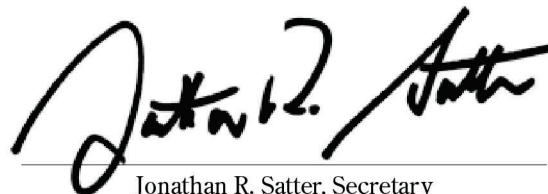
Juan R. Alvarez, P.E., President

State of Florida

Minority Business Certification

Alvarez Engineers, Inc.

Is certified under the provisions of
287 and 295.187, Florida Statutes, for a period from:
05/14/2021 to 05/14/2023



Jonathan R. Satter, Secretary
Florida Department of Management Services

MERRICK SQUARE

COMMUNITY DEVELOPMENT DISTRICT

5D

**Merrick Square Community Development District
Request for Qualifications – District Engineering Services**

Competitive Selection Criteria

	Ability and Adequacy of Professional Personnel	Consultant's Past Performance	Geographic Location	Willingness to Meet Time and Budget Requirements	Certified Minority Business Enterprise	Recent, Current and Projected Workloads	Volume of Work Previously Awarded to Consultant by District	TOTAL SCORE
<i>weight factor</i>	25	25	20	15	5	5	5	100
NAME OF RESPONDENT								
1 Alvarez Engineers, Inc.								

Board Member's Signature

Date

MERRICK SQUARE

COMMUNITY DEVELOPMENT DISTRICT

6A

SUN-SENTINEL

Sold To:

Merrick Square Community Development District - CU80131802
2300 Glades Rd, Ste 410W
Boca Raton,FL 33431-8556

Bill To:

Merrick Square Community Development District - CU80131802
2300 Glades Rd, Ste 410W
Boca Raton,FL 33431-8556

Published Daily

Fort Lauderdale, Broward County, Florida
Boca Raton, Palm Beach County, Florida
Miami, Miami-Dade County, Florida

State Of Florida
County Of Orange

Before the undersigned authority personally appeared
Rose Williams, who on oath says that he or she is a duly authorized representative of the SUN- SENTINEL,
a DAILY newspaper published in BROWARD/PALM BEACH/MIAMI-DADE County, Florida; that the
attached copy of advertisement, being a Legal Notice in:

The matter of 11700-Advertisement for Bids ,
n.a

Was published in said newspaper by print in the issues of, or by publication on the
newspaper’s website, if authorized on Feb 17, 2023

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

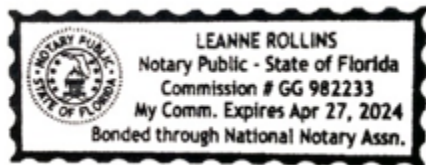


Signature of Affiant

Sworn to and subscribed before me this: February 18, 2023.



Signature of Notary Public



Name of Notary, Typed, Printed, or Stamped
Personally Known (X) or Produced Identification ()

Affidavit Delivery Method: E-Mail
Affidavit Email Address: gillyardd@whhassociates.com
7381287

**MERRICK SQUARE COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS FOR ANNUAL AUDIT SERVICES**

The Merrick Square Community Development District hereby requests proposals for annual financial auditing services. The proposal must provide for the auditing of the District's financial records for the fiscal year ending September 30, 2022, with an option for additional annual renewals, subject to mutual agreement by both parties. The District is a local unit of special-purpose government created under Chapter 190, Florida Statutes, for the purpose of financing, constructing, and maintaining public infrastructure. The District is located in Broward County, Florida. The final contract will require that, among other things, the audit for the fiscal year ending September 30, 2022, be completed no later than June 30, 2023. The auditing entity submitting a proposal must be duly licensed under Chapter 473, Florida Statutes, and be qualified to conduct audits in accordance with "Government Auditing Standards," as adopted by the Florida Board of Accountancy. Audits shall be conducted in accordance with Florida Law and particularly Section 218.39, Florida Statutes, and the rules of the Florida Auditor General. Proposal packages, which include evaluation criteria and instructions to proposers, are available from the District Manager at the address and telephone number listed below. Proposers must provide one (1) electronic copy and one (1) unbound copy of their proposal to the offices of the District Manager, located at 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431 ("District Manager"), in an envelope marked on the outside "Auditing Services, Merrick Square Community Development District." Proposals must be received by 12:00 p.m., on February 24, 2023, at the office of the District Manager. Please direct all questions regarding this Notice to the District Manager.

2/17/2023 7381287

MERRICK SQUARE

COMMUNITY DEVELOPMENT DISTRICT

6B

**MERRICK SQUARE COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS FOR ANNUAL AUDIT SERVICES**

The Merrick Square Community Development District hereby requests proposals for annual financial auditing services. The proposal must provide for the auditing of the District's financial records for the fiscal year ending September 30, 2022, with an option for additional annual renewals, subject to mutual agreement by both parties. The District is a local unit of special-purpose government created under Chapter 190, *Florida Statutes*, for the purpose of financing, constructing, and maintaining public infrastructure. The District is located in Broward County, Florida. The final contract will require that, among other things, the audit for the fiscal year ending September 30, 2022, be completed no later than June 30, 2023.

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District Manager

MERRICK SQUARE COMMUNITY DEVELOPMENT DISTRICT

REQUEST FOR PROPOSALS

District Auditing Services for Fiscal Year 2022

Broward County, Florida

INSTRUCTIONS TO PROPOSERS

SECTION 1. DUE DATE. Sealed proposals must be received no later than February 24, 2023, at 12:00 p.m., at the offices of District Manager, located at 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431. Proposals will be publicly opened at that time.

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

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

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

SECTION 5. SUBMISSION OF PROPOSAL. Submit one (1) electronic copy and one (1) unbound copy of the Proposal Documents, and other requested attachments at the time and place indicated herein, which shall be enclosed in an opaque sealed envelope, marked with the title "Auditing Services – Merrick Square Community Development District" on the face of it. **Please include pricing for each additional bond issuance.**

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

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

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

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

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

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

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

- A. List the position or title of all personnel to perform work on the District audit. Include resumes for each person listed; list years of experience in present position for each party listed and years of related experience.
- B. Describe proposed staffing levels, including resumes with applicable certifications.
- C. Three references from projects of similar size and scope. The Proposer should include information relating to the work it conducted for each reference as well as a name, address and phone number of a contact person.
- D. The lump sum cost of the provision of the services under the proposal, plus the lump sum cost of four (4) annual renewals.

SECTION 13. PROTESTS. In accordance with the District’s Rules of Procedure, any protest regarding the Proposal Documents, must be filed in writing, at the offices of the District Manager, within seventy-two (72) calendar hours (excluding Saturday, Sunday, and state holidays) after the receipt of the Proposal Documents. The formal protest setting forth with particularity the facts and law upon which the protest is based shall be

filed within seven (7) calendar days (including Saturday, Sunday, and state holidays) after the initial notice of protest was filed. Failure to timely file a notice of protest or failure to timely file a formal written protest shall constitute a waiver of any right to object or protest with respect to the aforesaid Proposal Documents.

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

**MERRICK SQUARE COMMUNITY DEVELOPMENT DISTRICT
AUDITOR SELECTION EVALUATION CRITERIA**

1. Ability of Personnel. (20 Points)

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

2. Proposer’s Experience. (20 Points)

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

3. Understanding of Scope of Work. (20 Points)

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

4. Ability to Furnish the Required Services. (20 Points)

Extent to which the proposal demonstrates the adequacy of Proposer’s financial resources and stability as a business entity necessary to complete the services required.

5. Price. (20 Points)***

Points will be awarded based upon the lowest total proposal for rendering the services and the reasonableness of the proposal.

Total (100 Points)

***Alternatively, the Board may choose to evaluate firms without considering price, in which case the remaining categories would be assigned 25 points each.

MERRICK SQUARE

COMMUNITY DEVELOPMENT DISTRICT

6C1

**MERRICK SQUARE
COMMUNITY DEVELOPMENT DISTRICT
PROPOSAL FOR AUDIT SERVICES**

PROPOSED BY:

Berger, Toombs, Elam, Gaines & Frank
CERTIFIED PUBLIC ACCOUNTANTS, PL

600 Citrus Avenue, Suite 200
Fort Pierce, Florida 34950

(772) 461-6120

CONTACT PERSON:

J. W. Gaines, CPA, Director

DATE OF PROPOSAL:

February 24, 2023

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Berger, Toombs, Elam, Gaines & Frank

Certified Public Accountants PL

600 Citrus Avenue
Suite 200
Fort Pierce, Florida 34950

772/461-6120 // 461-1155
FAX: 772/468-9278

February 24, 2023

Merrick Square Community Development District
Wrathell Hunt & Associates
2300 Glades Road, Suite 410W
Boca Raton, FL 33431

Dear District Manager:

Thank you very much for the opportunity to present our professional credentials to provide audit services for Merrick Square Community Development District.

Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL has assembled a team of governmental and nonprofit specialists second to none to serve our clients. Our firm has the necessary qualifications and experience to serve as the independent auditors for Merrick Square Community Development District. We will provide you with top quality, responsive service.

Experience

Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL is a recognized leader in providing services to governmental and nonprofit agencies throughout Florida. We have been the independent auditors for a number of local governmental agencies and through our experience in performing their audits, we have been able to increase our audit efficiency and; therefore, reduce costs. We have continually passed this cost savings on to our clients and will continue to do so in the future. As a result of our experience and expertise, we have developed an effective and efficient audit approach designed to meet or exceed the performance specifications in accordance with auditing standards generally accepted in the United States of America, the standards applicable to financial audits contained in Government Auditing Standards, issued by the Comptroller General of the United States, and the standards for financial and compliance audits. We will conduct the audit in accordance with auditing standards generally accepted in the United States of America; "Government Auditing Standards" issued by the Comptroller General of the United States; the provisions of the Single Audit Act, Subpart F of Title 2 US Code of Federal Regulations (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, with minimal disruption to your operations. Our firm has frequent technical updates to keep our personnel informed and up-to-date on all changes that are occurring within the industry.

Fort Pierce / Stuart

Member AICPA

- 1 -
Member AICPA Division for CPA Firms
Private Companies practice Section

Member FICPA

Merrick Square Community Development District
February 24, 2023

Our firm is a member of the Government Audit Quality Center, an organization dedicated to improving government audit quality. We also utilize the audit program software of a nationally recognized CPA firm to assure us that we are up to date with all auditing standards and to assist us maintain maximum audit efficiencies.

To facilitate your evaluation of our qualifications and experience, we have arranged this proposal to include a resume of our firm, including our available staff, our extensive prior governmental and nonprofit auditing experience and clients to be contacted.

You need a firm that will provide an efficient, cost-effective, high-quality audit within critical time constraints. You need a firm with the prerequisite governmental and nonprofit experience to perform your audit according to stringent legal and regulatory requirements, a firm that understands the complex nature of community development districts and their unique compliance requirements. You need a firm with recognized governmental and nonprofit specialists within the finance and governmental communities. And, certainly, you need a firm that will provide you with valuable feedback to enhance your current and future operations. Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL is that firm. J. W. Gaines is the person authorized to make representations for the firm.

Thank you again for the opportunity to submit this proposal to Merrick Square Community Development District.

Very truly yours,

*Berger Toombs Elam
Gaines + Frank*

Berger, Toombs, Elam, Gaines & Frank
Certified Public Accountants PL
Fort Pierce, Florida

PROFILE OF THE PROPOSER

Description and History of Audit Firm

Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL is a Treasure Coast public accounting firm, which qualifies as a small business firm, as established by the Small Business Administration (13 CFR 121.38), with offices in Fort Pierce and Stuart. We are a member of the Florida Institute of Certified Public Accountants and the American Institute of Certified Public Accountants. The firm was formed from the merger of Edwards, Berger, Harris & Company (originated in 1972) and McAlpin, Curtis & Associates (originated in 1949). J. W. Gaines and Associates (originated in 1979) merged with the firm in 2004. Our tremendous growth rate experienced over the last 69 years is directly attributable to the firm's unrelenting dedication to providing the highest quality, responsive professional services attainable to its clients.

We are a member of the Private Companies Practice Section (PCPS) of the American Institute of Certified Public Accountants (AICPA) to assure we meet the highest standards. Membership in this practice section requires that our firm meet more stringent standards than standard AICPA membership. These rigorous requirements include the requirement of a triennial peer review of our firm's auditing and accounting practice and annual Continuing Professional Education (CPE) for all accounting staff (whether CPA or non-CPA). For standard AICPA membership, only a quality review is required and only CPAs must meet CPE requirements.

We are also a member of the Government Audit Quality Center ("the Center") of the American Institute of Certified Public Accountants to assure the quality of our government audits. Membership in the Center, which is voluntary, requires our firm to comply with additional standards to promote the quality of government audits.

We have been extensively involved in serving local government entities with professional accounting, auditing and consulting services throughout the entire 69 year history of our firm. Our substantial experience over the years makes us uniquely qualified to provide accounting, auditing, and consulting services to these clients. We are a recognized leader in providing services to governmental and nonprofit agencies on the Treasure Coast and in Central and South Florida, with extensive experience in auditing community development districts and water control districts. We were the independent auditors of the City of Fort Pierce for over 37 years and currently, we are the independent auditors for St. Lucie County since 2002, and for 34 of the 38 years that the county has been audited by CPA firms. Additionally, we have performed audits of the City of Stuart, the City of Vero Beach, Indian River County and Martin County. We also presently audit over 75 Community Development Districts throughout Florida.

Our firm was founded on the belief that we are better able to respond to our clients needs through education, experience, independence, quality control, and personal service. Our firm's commitment to quality is reflected in our endeavor of professional excellence via continuing education, the use of the latest computer technology, professional membership in PCPS and peer review.

We believe our approach to audit engagements, intelligence and innovation teamed with sound professional judgment enables us to explore new concepts while remaining sensitive to the fundamental need for practical solutions. We take pride in giving you the assurance that the personal assistance you receive comes from years of advanced training, technical experience and financial acumen.

Professional Staff Resources

Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL has a total of 27 professional and administrative staff (including 12 professional staff with extensive experience servicing government entities). The work will be performed out of our Fort Pierce office with a proposed staff of one senior accountant and one or two staff accountants supervised by an audit manager and audit partner. With the exception of the directors of the firm's offices, the professional staff is not specifically assigned to any of our individual offices. The professional and administrative staff resources available to you through Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL are as follows:

	<u>Total</u>
Partners/Directors (CPA's)	5
Principals (CPA)	1
Managers (CPA)	1
Senior/Supervisor Accountants (2 CPA's)	3
Staff Accountants (1 CPA)	7
Computer Specialist	1
Paraprofessional	6
Administrative	<u>4</u>
Total – all personnel	28

Following is a brief description of each employee classification:

Staff Accountant – Staff accountants work directly under the constant supervision of the auditor-in-charge and, are responsible for the various testing of documents, account analysis and any other duties as his/her supervisor believes appropriate. Minimum qualification for a staff accountant is graduation from an accredited university or college with a degree in accounting or equivalent.

Senior Accountant – A senior accountant must possess all the qualifications of the staff accountant, in addition to being able to draft the necessary reports and financial statements, and supervise other staff accountants when necessary.

Managers – A manager must possess the qualifications of the senior accountant, plus be able to work without extensive supervision from the auditor-in-charge. The manager should be able to draft audit reports from start to finish and to supervise the audit team, if necessary.

Principal – A principal is a partner/director in training. He has been a manager for several years and possesses the technical skills to act as the auditor-in-charge. A principal has no financial interest in the firm.

Partner/Director – The director has extensive governmental auditing experience and acts as the auditor-in-charge. Directors have a financial interest in the firm.

Professional Staff Resources (Continued)

Independence – Independence of the public accounting firm, with respect to the audit client, is the foundation from which the public gains its trust in the opinion issued by the public accounting firm at the end of the audit process. This independence must be in appearance as well as in fact. The public must perceive that the accounting firm is independent of the audit entity to ensure that nothing would compromise the opinion issued by the public accounting firm. **Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL** is independent of Merrick Square Community Development District, including its elected officials and related parties, at the date of this proposal, as defined by the following rules, regulations, and standards:

AuSection 220 – Statements on Auditing Standards issued by the American Institute of Certified Public Accountants;

ET Sections 101 and 102 – Code of Professional Conduct of the American Institute of Certified Public Accountants;

Chapter 21A-1, Florida Administrative Code;

Section 473.315, Florida Statutes; and,

Government Auditing Standards, issued by the Comptroller General of the United States.

On an annual basis, all members of the firm are required to confirm, in writing, that they have no personal or financial relationships or holding that would impair their independence with regard to the firm's clients.

Independence is a hallmark of our profession. We encourage our staff to use professional judgment in situations where our independence could be impaired or the perception of a conflict of interest might exist. In the governmental sector, public perception is as important as professional standards. Therefore, the utmost care must be exercised by independent auditors in the performance of their duties.

Ability to Furnish the Required Services

As previously noted in the Profile of the Proposer section of this document, our firm has been in existence for over 69 years. We have provided audit services to some clients for over 30 years continually. Our firm is insured against physical loss through commercial insurance and we also carry liability insurance. The majority of our audit documentation is stored electronically, both on our office network and on each employee laptop or computer assigned to each specific job. Our office computer network is backed up on tape, so in the event of a total equipment loss, we can restore all data as soon as replacement equipment is acquired. In addition, our field laptop computers carry the same data and can be used in the event of emergency with virtually no delay in completing the required services.

ADDITIONAL SERVICES PROVIDED

Arbitrage Rebate Services

Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL also provides arbitrage rebate compliance and related services to governmental issuers. The Tax Reform Act of 1986 requires issuers of most tax-exempt obligations to pay (i.e., “rebate”) to the United States government any arbitrage profits. Arbitrage profits are earnings on the investment of bond proceeds and certain other monies in excess of what would have been earned had such monies been invested at a yield equal to the yield on the bonds.

Federal tax law requires that interim rebate calculations and payments are due at the end of every fifth bond year. Final payment is required upon redemption of the bonds. More frequent calculations may be deemed advisable by an issuer’s auditor, trustee or bond counsel or to assure that accurate and current records are available. These more frequent requirements are usually contained in the Arbitrage or Rebate Certificate with respect to the bonds.

Our firm performs a comprehensive rebate analysis and includes the following:

- Verifying that the issue is subject to rebate;
- Calculating the bond yield;
- Identifying, and separately accounting for, all “Gross Proceeds” (as that term is defined in the Code) of the bond issue, including those requiring analysis due to “transferred proceeds” and/or “commingled funds” circumstances;
- Determining what general and/or elective options are available to Gross proceeds of the issue;
- Calculating the issue’s excess investment earning (rebate liability), if any;
- Delivering appropriate documentation to support all calculations;
- Providing an executive summary identifying the methodology employed, major assumptions, conclusions, and any other recommendations for changes in recordkeeping and investment policies;
- Assisting as necessary in the event of an Internal Revenue Service inquiry; and,
- Consulting with issue staff, as necessary, regarding arbitrage related matters.

GOVERNMENTAL AUDITING EXPERIENCE

Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL has been practicing public accounting in Florida for 69 years. Our success over the years has been the result of a strong commitment to providing personalized quality service to our clients.

The current members of our firm have performed audits of over 900 community development districts, and over 1,800 audits of municipalities, counties and other governmental entities such as the City of Fort Pierce and St. Lucie County.

Our firm provides a variety of accounting, auditing, tax litigation support, and consulting services. Some of the professional accounting, auditing and management consulting services that are provided by our firm are listed below:

- Performance of annual financial and compliance audits, including Single Audits of state and federal financial assistance programs, under the provisions of the Single Audit Act, Subpart F of Title 2 U.S. Code of Federal Regulations (CFR) Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance), with minimal disruptions to your operations;
- Performance of special compliance audits to ascertain compliance with the applicable local, state and federal laws and regulations;
- Issuance of comfort letters and consent letters in conjunction with the issuance of tax-exempt debt obligations, including compiling financial data and interim period financial statement reviews;
- Calculation of estimated and actual federal arbitrage rebates;
- Assistance in compiling historical financial data for first-time and supplemental submissions for GFOA Certificate of Achievement for Excellence in Financial Reporting;
- Preparation of indirect cost allocation systems in accordance with Federal and State regulatory requirements;
- Providing human resource and employee benefit consulting;
- Performance of automation feasibility studies and disaster recovery plans;
- Performance feasibility studies concerning major fixed asset acquisitions and utility plant expansion plans (including electric, water, pollution control, and sanitation utilities); and
- Assistance in litigation, including testimony in civil and criminal court.
- Assist clients who utilize QuickBooks software with their software needs. Our Certified QuickBooks Advisor has undergone extensive training through QuickBooks and has passed several exams to attain this Certification.

Continuing Professional Education

All members of the governmental audit staff of our firm, and audit team members assigned to this engagement, are in compliance with the Continuing Professional Education (CPE) requirements set forth in Government Auditing Standards issued by the Comptroller General of the United States. In addition, our firm is in compliance with the applicable provisions of the Florida Statutes that require CPA's to have met certain CPE requirements prior to proposing on governmental audit engagements.

GOVERNMENTAL AUDITING EXPERIENCE (CONTINUED)

The audit team has extensive experience in performing governmental audits and is exposed to intensive and continuing concentration on these types of audits. Due to the total number of governmental audits our team performs, each member of our governmental staff must understand and be able to perform several types of governmental audits. It is our objective to provide each professional employee fifty hours or more of comprehensive continuing professional education each year. This is accomplished through attending seminars throughout Florida and is reinforced through in-house training.

Our firm has made a steadfast commitment to professional education. Our active attendance and participation in continuing professional education is a major part of our objective to obtain the most recent knowledge on issues which are of importance to our clients. We are growing on the reputation for work that our firm is providing today.

Quality Control Program

Quality control requires continuing commitment to professional excellence. **Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL** is formally dedicated to that commitment.

To ensure maintaining the standards of working excellence required by our firm, we joined the Private Companies Practice Section (PCPS) of the American Institute of Certified Public Accountants (AICPA). To be a participating member firm of this practice section, a firm must obtain an independent Peer Review of its quality control policies and procedures to ascertain the firm's compliance with existing auditing standards on the applicable engagements.

The scope of the Peer Review is comprehensive in that it specifically reviews the following quality control policies and procedures of the participating firm:

- Professional, economic, and administrative independence;
- Assignment of professional personnel to engagements;
- Consultation on technical matters;
- Supervision of engagement personnel;
- Hiring and employment of personnel;
- Professional development;
- Advancement;
- Acceptance and continuation of clients; and,
- Inspection and review system.

We believe that our commitment to the program is rewarding not only to our firm, but primarily to our clients.

The external independent Peer Review of the elements of our quality control policies and procedures performed by an independent certified public accountant, approved by the PCPS of the AICPA, provides you with the assurance that we continue to conform to standards of the profession in the conduct of our accounting and auditing practice.

GOVERNMENTAL AUDITING EXPERIENCE (CONTINUED)

Our firm is also a member of Governmental Audit Quality Center (GAQC), a voluntary membership center for CPA firms that perform governmental audits. This center promotes the quality of governmental audits.

Our firm has completed successive Peer Reviews. These reviews included a representative sample of our firm's local governmental auditing engagements. As a result of these reviews, our firm obtained an unqualified opinion on our quality control program and work procedures. On page 31 is a copy of our most recent Peer Review report. It should be noted that we received a pass rating.

Our firm has never had any disciplinary actions by state regulatory bodies or professional organizations.

As our firm performs approximately one hundred audits each year that are reviewed by federal, state or local entities, we are constantly dealing with questions from these entities about our audits. We are pleased to say that any questions that have been raised were minor issues and were easily resolved without re-issuing any reports.

Certificate of Achievement for Excellence in Financial Reporting (CAFR)

We are proud and honored to have been involved with the City of Fort Pierce and the Fort Pierce Utilities Authority when they received their first Certificates of Achievement for Excellence in Financial Reporting for the fiscal years ended September 30, 1988 and 1994, respectively. We were also instrumental in the City of Stuart receiving the award, in our first year of performing their audit, for the year ended September 30, 1999.

We also assisted St. Lucie County, Florida for the year ended September 30, 2003, in preparing their first Comprehensive Annual Financial Report, and St. Lucie County has received their Certificate of Achievement for Excellence in Financial Reporting every year since.

As continued commitment to insuring that we are providing the highest level of experience, we have had at least one employee of our firm serve on the GFOA – Special Review Committee since the mid-1980s. This committee is made up of selective Certified Public Accountants throughout the United States who have demonstrated their high level of knowledge and expertise in governmental accounting. Each committee member attends a special review meeting at the Annual GFOA Conference. At this meeting, the committee reports on the Certificate of Achievement Program's most recent results, future goals, and common reporting deficiencies.

We feel that our previous experience in assisting the City of Fort Pierce, the Fort Pierce Utilities Authority and St. Lucie County obtain their first CAFRs, and the City of Stuart in continuing to receive a CAFR and our firm's continued involvement with the GFOA, and the CAFR review committee make us a valued asset for any client in the field of governmental financial reporting.

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

References

Terracina Community Development
District
Jeff Walker, Special District Services
(561) 630-4922

Gateway Community Development
District
Stephen Bloom, Severn Trent Management
(954) 753-5841

The Reserve Community Development District

Darrin Mossing, Governmental Management
Services LLC
(407) 841-5524

Port of the Islands Community Development
District
Cal Teague, Premier District Management

(239) 690-7100 ext 101

In addition to the above, we have the following additional governmental audit experience:

Community Development Districts

Aberdeen Community Development
District

Beacon Lakes Community
Development District

Alta Lakes Community Development
District

Beaumont Community Development
District

Amelia Concourse Community
Development District

Bella Collina Community Development
District

Amelia Walk Community
Development District

Bonnet Creek Community
Development District

Aqua One Community Development
District

Buckeye Park Community
Development District

Arborwood Community Development
District

Candler Hills East Community
Development District

Arlington Ridge Community
Development District

Cedar Hammock Community
Development District

Bartram Springs Community
Development District

Central Lake Community
Development District

Baytree Community Development
District

Channing Park Community
Development District

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Cheval West Community Development District	Evergreen Community Development District
Coconut Cay Community Development District	Forest Brooke Community Development District
Colonial Country Club Community Development District	Gateway Services Community Development District
Connerton West Community Development District	Gramercy Farms Community Development District
Copperstone Community Development District	Greenway Improvement District
Creekside @ Twin Creeks Community Development District	Greyhawk Landing Community Development District
Deer Run Community Development District	Griffin Lakes Community Development District
Dowden West Community Development District	Habitat Community Development District
DP1 Community Development District	Harbor Bay Community Development District
Eagle Point Community Development District	Harbourage at Braden River Community Development District
East Nassau Stewardship District	Harmony Community Development District
Eastlake Oaks Community Development District	Harmony West Community Development District
Easton Park Community Development District	Harrison Ranch Community Development District
Estancia @ Wiregrass Community Development District	Hawkstone Community Development District

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Heritage Harbor Community Development District	Madeira Community Development District
Heritage Isles Community Development District	Marhsall Creek Community Development District
Heritage Lake Park Community Development District	Meadow Pointe IV Community Development District
Heritage Landing Community Development District	Meadow View at Twin Creek Community Development District
Heritage Palms Community Development District	Mediterra North Community Development District
Heron Isles Community Development District	Midtown Miami Community Development District
Heron Isles Community Development District	Mira Lago West Community Development District
Highland Meadows II Community Development District	Montecito Community Development District
Julington Creek Community Development District	Narcoossee Community Development District
Laguna Lakes Community Development District	Naturewalk Community Development District
Lake Bernadette Community Development District	New Port Tampa Bay Community Development District
Lakeside Plantation Community Development District	Overoaks Community Development District
Landings at Miami Community Development District	Panther Trace II Community Development District
Legends Bay Community Development District	Paseo Community Development District
Lexington Oaks Community Development District	Pine Ridge Plantation Community Development District
Live Oak No. 2 Community Development District	Piney Z Community Development District

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Poinciana Community Development District	Sampson Creek Community Development District
Poinciana West Community Development District	San Simeon Community Development District
Port of the Islands Community Development District	Six Mile Creek Community Development District
Portofino Isles Community Development District	South Village Community Development District
Quarry Community Development District	Southern Hills Plantation I Community Development District
Renaissance Commons Community Development District	Southern Hills Plantation III Community Development District
Reserve Community Development District	South Fork Community Development District
Reserve #2 Community Development District	St. John's Forest Community Development District
River Glen Community Development District	Stoneybrook South Community Development District
River Hall Community Development District	Stoneybrook South at ChampionsGate Community Development District
River Place on the St. Lucie Community Development District	Stoneybrook West Community Development District
Rivers Edge Community Development District	Tern Bay Community Development District
Riverwood Community Development District	Terracina Community Development District
Riverwood Estates Community Development District	Tison's Landing Community Development District
Rolling Hills Community Development District	TPOST Community Development District
Rolling Oaks Community Development District	

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Triple Creek Community
Development District

Vizcaya in Kendall
Development District

TSR Community Development
District

Waterset North Community
Development District

Turnbull Creek Community
Development District

Westside Community Development
District

Twin Creeks North Community
Development District

WildBlue Community Development
District

Urban Orlando Community
Development District

Willow Creek Community
Development District

Verano #2 Community
Development District

Willow Hammock Community
Development District

Viera East Community
Development District

Winston Trails Community
Development District

VillaMar Community
Development District

Zephyr Ridge Community
Development District

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Other Governmental Organizations

City of Westlake	Office of the Medical Examiner, District 19
Florida Inland Navigation District	Rupert J. Smith Law Library of St. Lucie County
Fort Pierce Farms Water Control District	St. Lucie Education Foundation
Indian River Regional Crime Laboratory, District 19, Florida	Seminole Improvement District
Viera Stewardship District	Troup Indiantown Water Control District

Current or Recent Single Audits.

St. Lucie County, Florida
Early Learning Coalition, Inc.
Treasure Coast Food Bank, Inc.

Members of our audit team have acquired extensive experience from performing or participating in over 1,800 audits of governments, independent special taxing districts, school boards, and other agencies that receive public money and utilize fund accounting.

Much of our firm's auditing experience is with compliance auditing, which is required for publicly financed agencies. In this type of audit, we do a financial examination and also confirm compliance with various statutory and regulatory guidelines.

Following is a summary of our other experience, including Auditor General experience, as it pertains to other governmental and fund accounting audits.

Counties

(Includes elected constitutional officers, utilities and dependent taxing districts)

Indian River
Martin
Okeechobee
Palm Beach

Municipalities

City of Port St. Lucie
City of Vero Beach
Town of Orchid

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Special Districts

Bannon Lakes Community Development District
Boggy Creek Community Development District
Capron Trail Community Development District
Celebration Pointe Community Development District
Coquina Water Control District
Diamond Hill Community Development District
Dovera Community Development District
Durbin Crossing Community Development District
Golden Lakes Community Development District
Lakewood Ranch Community Development District
Martin Soil and Water Conservation District
Meadow Pointe III Community Development District
Myrtle Creek Community Development District
St. Lucie County – Fort Pierce Fire District
The Crossings at Fleming Island
St. Lucie West Services District
Indian River County Mosquito Control District
St. John's Water Control District
Westchase and Westchase East Community Development Districts
Pier Park Community Development District
Verandahs Community Development District
Magnolia Park Community Development District

Schools and Colleges

Federal Student Aid Programs – Indian River Community College
Indian River Community College
Okeechobee County District School Board
St. Lucie County District School Board

State and County Agencies

Central Florida Foreign-Trade Zone, Inc. (a nonprofit organization affiliated with the St. Lucie County Board of County Commissioners)
Florida School for Boys at Okeechobee
Indian River Community College Crime Laboratory
Indian River Correctional Institution

FEE SCHEDULE

We propose the fee for our audit services described below to be \$3,175 for the year ended September 30, 2022, \$3,850 for the year ended September 30, 2023, \$3,970 for the year ended September 30, 2024, and \$4,080 for the years ended September 30, 2025 and 2026. Our fee for the year ended September 30, 2022 with issued bonds will be \$3,950. The fee is contingent upon the financial records and accounting systems of Merrick Square Community Development District being "audit ready" and the financial activity for the District is not materially increased. If we discover that additional preparation work or subsidiary schedules are needed, we will consult with your authorized representative. We can assist with this additional work at our standard rates should you desire.

SCOPE OF WORK TO BE PERFORMED

If selected as the District's auditors, we will perform a financial and compliance audit in accordance with Section 11.45, Florida Statutes, in order to express an opinion on an annual basis on the financial statements of Merrick Square Community Development District as of September 30, 2022, 2023, 2024, 2025, and 2026. The audits will be performed to the extent necessary to express an opinion on the fairness in all material respects with which the financial statements present the financial position, results of operations and changes in financial position in conformity with generally accepted accounting principles and to determine whether, for selected transactions, operations are properly conducted in accordance with legal and regulatory requirements. Reportable conditions that are also material weaknesses shall be identified as such in the Auditors' Report on Internal Control over Financial Reporting and on Compliance and Other Matters. Other (non-reportable) conditions discovered during the course of the audit will be reported in a separate letter to management, which will be referred to in the Auditors' Report on Internal Control over Financial Reporting and on Compliance and Other Matters.

Our audit will be performed in accordance with standards for financial and compliance audits contained in *Government Auditing Standards*, as well as in compliance with rules and regulations of audits of special districts as set forth by the State Auditor General in Chapter 10.550, Local Governmental Entity Audits, and other relevant federal, state and county orders, statutes, ordinances, charter, resolutions, bond covenants, Administrative Code and procedures, or rules and regulations which may pertain to the work required in the engagement.

The primary purpose of our audit will be to express an opinion on the financial statements discussed above. It should be noted that such audits are subject to the inherent risk that errors or irregularities may not be detected. However, if conditions are discovered which lead to the belief that material errors, defalcations or other irregularities may exist or if other circumstances are encountered that require extended services, we will promptly notify the appropriate individual.

Commitment to Quality Service

Personnel Qualifications and Experience

J. W. Gaines, CPA, CITP

Director – 41 years

Education

- ◆ Stetson University, B.B.A. – Accounting

Registrations

- ◆ Certified Public Accountant – State of Florida, State Board of Accountancy
- ◆ Certified Information Technology Professional (CITP) – American Institute of Certified Public Accountants

Professional Affiliations/Community Service

- ◆ Member of the American and Florida Institutes of Certified Public Accountants
- ◆ Affiliate member Government Finance Officers Association
- ◆ Past President, Vice President-Campaign Chairman, Vice President and Board Member of United Way of St. Lucie County, 1989 - 1994
- ◆ Past President, President Elect, Secretary and Treasurer of the Treasure Coast Chapter of the Florida Institute of Certified Public Accountants, 1988 - 1991
- ◆ Past President of Ft. Pierce Kiwanis Club, 1994 - 95, Member/Board Member since 1982
- ◆ Past President, Vice President and Treasurer of St. Lucie County Chapter of the American Cancer Society, 1980 -1986
- ◆ Member of the St. Lucie County Chamber of Commerce, Member Board of Directors, Treasurer, September 2002 - 2006, Chairman Elect 2007, Chairman 2008, Past Chairman 2009
- ◆ Member Lawnwood Regional Medical Center Board of Trustees, 2000 – Present, Chairman 2013 - Present
- ◆ Member of St. Lucie County Citizens Budget Committee, 2001 – 2002
- ◆ Member of Ft. Pierce Citizens Budget Advisory Committee, 2010 – 2011
- ◆ Member of Ft. Pierce Civil Service Appeals Board, 2013 - Present

Professional Experience

- ◆ Miles Grant Development/Country Club – Stuart, Florida, July 1975 – October 1976
- ◆ State Auditor General's Office – Public Accounts Auditor – November 1976 through September 1979
- ◆ Director - Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants PL, responsible for numerous government and nonprofit audits.
- ◆ Over 40 years experience in all phases of public accounting and auditing experience, with a concentration in financial and compliance audits. Mr. Gaines has been involved in all phases of the audits listed on the preceding pages.

Commitment to Quality Service

Personnel Qualifications and Experience

J. W. Gaines, CPA, CITP (Continued)

Director

Continuing Professional Education

- ◆ Has participated in numerous continuing professional education courses provided by nationally recognized sponsors over the last two years to keep abreast of the latest developments in accounting and auditing such as:
 - Governmental Accounting Report and Audit Update
 - Analytical Procedures, FICPA
 - Annual Update for Accountants and Auditors
 - Single Audit Sampling and Other Considerations

Commitment to Quality Service

Personnel Qualifications and Experience

David S. McGuire, CPA, CITP

Accounting and Audit Principal – 18 years

Accounting and Audit Manager – 4 years

Staff Accountant – 11 years

Education

- ◆ University of Central Florida, B.A. – Accounting
- ◆ Barry University – Master of Professional Accountancy

Registrations

- ◆ Certified Public Accountant – State of Florida, State Board of Accountancy
- ◆ Certified Information Technology Professional (CITP) – American Institute of Certified Public Accountants
- ◆ Certified Not-For-Profit Core Concepts 2018

Professional Affiliations/Community Service

- ◆ Member of the American and Florida Institutes of Certified Public Accountants
- ◆ Associate Member, Florida Government Finance Office Associates
- ◆ Assistant Coach – St. Lucie County Youth Football Organization (1994 – 2005)
- ◆ Assistant Coach – Greater Port St. Lucie Football League, Inc. (2006 – 2010)
- ◆ Board Member – Greater Port St. Lucie Football League, Inc. (2011 – 2017)
- ◆ Treasurer, AIDS Research and Treatment Center of the Treasure Coast, Inc. (2000 – 2003)
- ◆ Board Member/Treasurer, North Treasure Coast Chapter, American Red Cross (2004 – 2010)
- ◆ Member/Board Member of Port St. Lucie Kiwanis (1994 – 2001)
- ◆ President (2014/15) of Sunrise Kiwanis of Fort Pierce (2004 – 2017)
- ◆ St. Lucie District School Board Superintendent Search Committee (2013 – present)
- ◆ Board Member – Phrozen Pharoes (2019-2021)

Professional Experience

- ◆ Twenty-eight years public accounting experience with an emphasis on nonprofit and governmental organizations.
- ◆ Audit Manager in-charge on a variety of audit and review engagements within several industries, including the following government and nonprofit organizations:
 - St. Lucie County, Florida
 - 19th Circuit Office of Medical Examiner
 - Troup Indiantown Water Control District
 - Exchange Club Center for the Prevention of Child Abuse, Inc.
 - Healthy Kids of St. Lucie County
 - Mustard Seed Ministries of Ft. Pierce, Inc.
 - Reaching Our Community Kids, Inc.
 - Reaching Our Community Kids - South
 - St. Lucie County Education Foundation, Inc.
 - Treasure Coast Food Bank, Inc.
 - North Springs Improvement District
- ◆ Four years of service in the United States Air Force in computer operations, with a top secret (SCI/SBI) security clearance.

Commitment to Quality Service

Personnel Qualifications and Experience

David S. McGuire, CPA, CITP (Continued)

Accounting and Audit Principal

Continuing Professional Education

- ◆ Mr. McGuire has attended numerous continuing professional education courses and seminars taught by nationally recognized sponsors in the accounting auditing and single audit compliance areas. He has attended courses over the last two years in those areas as follows:

- Not-for-Profit Auditing Financial Results and Compliance Requirements

- Update: Government Accounting Reporting and Auditing

- Annual Update for Accountants and Auditors

Commitment to Quality Service

Personnel Qualifications and Experience

David F. Haughton, CPA

Accounting and Audit Manager – 30 years

Education

- ◆ Stetson University, B.B.A. – Accounting

Registrations

- ◆ Certified Public Accountant – State of Florida, State Board of Accountancy

Professional Affiliations/Community Service

- ◆ Member of the American and Florida Institutes of Certified Public Accountants
- ◆ Former Member of Florida Institute of Certified Public Accountants Committee on State and Local Government
- ◆ Affiliate Member Government Finance Officers Association (GFOA) for over 10 years
- ◆ Affiliate Member Florida Government Finance Officers Association (FGFOA) for over 10 years
- ◆ Technical Review – 1997 FICPA Course on State and Local Governments in Florida
- ◆ Board of Directors – Kiwanis of Ft. Pierce, Treasurer – 1994-1999; Vice President – 1999-2001

Professional Experience

- ◆ Twenty-seven years public accounting experience with an emphasis on governmental and nonprofit organizations.
- ◆ State Auditor General's Office – West Palm Beach, Staff Auditor, June 1985 to September 1985
- ◆ Accounting and Audit Manager of Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants PL, responsible for audit and accounting services including governmental and not-for-profit audits.
- ◆ Over 20 years of public accounting and governmental experience, specializing in governmental and nonprofit organizations with concentration in special districts, including Community Development Districts which provide services including water and sewer utilities. Governmental and non-profit entities served include the following:

Counties:

St. Lucie County

Municipalities:

City of Fort Pierce

City of Stuart

Commitment to Quality Service

Personnel Qualifications and Experience

David F. Haughton, CPA (Continued)

Accounting and Audit Manager

Professional Experience (Continued)

Special Districts:

Bluewaters Community Development District
Country Club of Mount Dora Community Development District
Fiddler's Creek Community Development District #1 and #2
Indigo Community Development District
North Springs Improvement District
Renaissance Commons Community Development District
St. Lucie West Services District
Stoneybrook Community Development District
Summerville Community Development District
Terracina Community Development District
Thousand Oaks Community Development District
Tree Island Estates Community Development District
Valencia Acres Community Development District

Non-Profits:

The Dunbar Center, Inc.
Hibiscus Children's Foundation, Inc.
Hope Rural School, Inc.
Maritime and Yachting Museum of Florida, Inc.
Tykes and Teens, Inc.
United Way of Martin County, Inc.
Workforce Development Board of the Treasure Coast, Inc.

- ◆ While with the Auditor General's Office he was on the staff for the state audits of the Martin County School District and Okeechobee County School District.
- ◆ During 1997 he performed a technical review of the Florida Institute of Certified Public Accountants state CPE course on Audits of State and Local Governments in Florida. His comments were well received by the author and were utilized in future updates to the course.

Continuing Professional Education

- ◆ During the past several years, he has participated in numerous professional development training programs sponsored by the AICPA and FICPA, including state conferences on special districts and governmental auditing in Florida. He averages in excess of 100 hours bi-annually of advanced training which exceeds the 80 hours required in accordance with the continuing professional education requirements of the Florida State Board of accountancy and the AICPA Private Companies Practice Section. He has over 75 hours of governmental CPE credit within the past two years.

Commitment to Quality Service

Personnel Qualifications and Experience

Matthew Gonano, CPA

Senior Staff Accountant – 10 years

Education

- ◆ University of North Florida, B.B.A. – Accounting
- ◆ University of Alicante, Spain – International Business
- ◆ Florida Atlantic University – Masters of Accounting

Professional Affiliations/Community Service

- ◆ American Institute of Certified Public Accountants
- ◆ Florida Institute of Certified Public Accountants

Professional Experience

- ◆ Senior Accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.
- ◆ Performed audits of nonprofit and governmental organizations in accordance with Governmental Accounting Auditing Standards (GAAS)
- ◆ Performed Single Audits of nonprofit organizations in accordance with OMB Circular A-133, Audits of State, Local Governments, and Non-Profit Organizations.

Continuing Professional Education

- ◆ Mr. Gonano has participated in numerous continuing professional education courses.

Commitment to Quality Service

Personnel Qualifications and Experience

Paul Daly

Staff Accountant – 9 years

Education

- ◆ Florida Atlantic University, B.S. – Accounting

Professional Experience

- ◆ Staff Accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

Continuing Professional Education

- ◆ Working to attain the requirements to take the Certified Public Accounting (CPA) exam.

Commitment to Quality Service

Personnel Qualifications and Experience

Melissa Marlin, CPA

Senior Staff Accountant – 9 years

Education

- ◆ Indian River State College, A.A. – Accounting
- ◆ Florida Atlantic University, B.B.A. – Accounting

Professional Experience

- ◆ Staff accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

Continuing Professional Education

- ◆ Mrs. Marlin participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.

Commitment to Quality Service

Personnel Qualifications and Experience

Bryan Snyder

Staff Accountant – 8 years

Education

- ◆ Florida Atlantic University, B.B.A. – Accounting

Professional Experience

- ◆ Accountant beginning his professional auditing career with Berger, Toombs, Elam, Gaines, & Frank.
- ◆ Mr. Snyder is gaining experience auditing governmental & nonprofit entities.

Continuing Professional Education

- ◆ Mr. Snyder participates in numerous continuing education courses and plans on working to acquire his CPA certificate.
- ◆ Mr. Snyder is currently studying to pass the CPA exam.

Commitment to Quality Service

Personnel Qualifications and Experience

Maritza Stonebraker, CPA

Senior Accountant – 7 years

Education

- ◆ Indian River State College, B.S. – Accounting

Professional Experience

- ◆ Staff Accountant beginning her professional auditing career with Berger, Toombs, Elam, Gaines, & Frank.

Continuing Professional Education

- ◆ Mrs. Stonebraker participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.

Commitment to Quality Service

Personnel Qualifications and Experience

Jonathan Herman, CPA

Senior Staff Accountant – 9 years

Education

- ◆ University of Central Florida, B.S. – Accounting
- ◆ Florida Atlantic University, MACC

Professional Experience

- ◆ Accounting graduate with nine years experience with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

Continuing Professional Education

- ◆ Mr. Herman participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.

Commitment to Quality Service

Personnel Qualifications and Experience

Sean Stanton, CPA

Staff Accountant – 5 years

Education

- ◆ University of South Florida, B.S. – Accounting
- ◆ Florida Atlantic University, M.B.A. – Accounting

Professional Experience

- ◆ Staff accountant with Berger, Toombs, Elam, Gaines, & Frank auditing governmental and non-profit entities.

Continuing Professional Education

- ◆ Mr. Stanton participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.

Commitment to Quality Service

Personnel Qualifications and Experience
--

Tifanee Terrell

Staff Accountant – 2 years

Education

- ◆ Florida Atlantic University, M.A.C.C. – Accounting

Professional Experience

- ◆ Staff Accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

Continuing Professional Education

- ◆ Ms. Terrell participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.
- ◆ Ms. Terrell is currently studying to pass the CPA exam.

Commitment to Quality Service

Personnel Qualifications and Experience

Dylan Dixon

Staff Accountant – 1 year

Education

- ◆ Indian River State College, A.A. – Accounting

Professional Experience

- ◆ Staff Accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

Continuing Professional Education

- ◆ Mr. Dixon is currently pursuing a bachelor's degree in Accounting.
- ◆ Mr. Dixon participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.
- ◆ Mr. Dixon is currently working towards completing an additional 30 hours of education to qualify to sit for CPA exam.

Commitment to Quality Service

Personnel Qualifications and Experience
--

Maurice Wally
Staff Accountant

Education

- ◆ Indian River State College, A.A. – Accounting

Professional Experience

- ◆ Staff Accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

Continuing Professional Education

- ◆ Mr. Wally is currently enrolled at Indian River State College and will complete his degree in December 2022.
- ◆ Mr. Wally participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.
- ◆ Mr. Wally is currently working towards completing an additional 30 hours of education to qualify to sit for CPA exam.

Commitment to Quality Service

Personnel Qualifications and Experience

Brennen Moore

Staff Accountant

Education

- ◆ Indian River State College, A.A. – Accounting

Professional Experience

- ◆ Staff Accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

Continuing Professional Education

- ◆ Mr. Moore is currently enrolled at Indian River State College and will complete his bachelor's degree in spring of 2023.
- ◆ Mr. Moore participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.
- ◆ Mr. Moore is currently working towards completing an additional 30 hours of education to qualify to sit for CPA exam.

Commitment to Quality Service

Personnel Qualifications and Experience

Jordan Wood
Staff Accountant

Education

- ◆ Indian River State College, A.A. – Accounting

Professional Experience

- ◆ Staff Accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

Continuing Professional Education

- ◆ Ms. Wood is currently enrolled at Indian River State College to complete her bachelor's degree.
- ◆ Ms. Wood participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.
- ◆ Ms. Wood is currently working towards completing an additional 30 hours of education to qualify to sit for CPA exam.



Judson B. Baggett | 6815 Dairy Road
MBA, CPA, CVA, Partner | Zephyrhills, FL 33542
Marci Reutimann | (813) 788-2155
CPA, Partner | (813) 782-8606

Report on the Firm's System of Quality Control

To the Partners
Berger, Toombs, Elam, Gaines & Frank, CPAs, PL
and the Peer Review Committee of the Florida Institute of Certified Public Accountants

October 30, 2019

We have reviewed the system of quality control for the accounting and auditing practice of Berger, Toombs, Elam, Gaines & Frank, CPAs, PL, (the firm), in effect for the year ended May 31, 2019. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants (Standards).

A summary of the nature, objectives, scope, limitations of, and the procedures performed in a System Review as described in the Standards may be found at aicpa.org/prsummary. The summary also includes an explanation of how engagements identified as not performed or reported in conformity with applicable professional standards, if any, are evaluated by a peer reviewer to determine a peer review rating.

Firm's Responsibility

The firm is responsible for designing a system of quality control and complying with it to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. The firm is also responsible for evaluating actions to promptly remediate engagements deemed as not performed or reported in conformity with professional standards, when appropriate, and for remediating weaknesses in its system of quality control, if any.

Peer Reviewer's Responsibility

Our responsibility is to express an opinion on the design of the system of quality control, and the firm's compliance therewith based on our review.

Required Selections and Considerations

Engagements selected for review included engagements performed under *Government Auditing Standards*, including a compliance audit under the Single Audit Act.

As a part of our peer review, we considered reviews by regulatory entities as communicated by the firm, if applicable, in determining the nature and extent of our procedures.

Opinion

In our opinion, the system of quality control for the accounting and auditing practice of Berger, Toombs, Elam, Gaines & Frank, CPAs, PL, in effect for the year ended May 31, 2019, has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of *pass*, *pass with deficiency(ies)*, or *fail*. Berger, Toombs, Elam, Gaines & Frank, CPAs, PL has received a peer review rating of *pass*.

Baggett, Reutimann + Associates, CPAs PA
BAGGETT, REUTIMANN & ASSOCIATES, CPAs, PA
Signed Electronically by Judson B. Baggett, Reutimann & Associates, CPAs, PA, 10/30/19 email: jbaggett@brpa.com

Member American Institute of Certified Public Accountants (AICPA) and Florida Institute of Certified Public Accountants (FICPA)
National Association of Certified Valuation Analysts (NACVA)

**MERRICK SQUARE COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS**

District Auditing Services for Fiscal Year 2022
Broward County, Florida

INSTRUCTIONS TO PROPOSERS

SECTION 1. DUE DATE. Sealed proposals must be received no later than February 24, 2023, at 12:00 p.m., at the offices of District Manager, located at 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431. Proposals will be publicly opened at that time.

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

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

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

SECTION 5. SUBMISSION OF PROPOSAL. Submit one (1) electronic copy and one (1) unbound copy of the Proposal Documents, and other requested attachments at the time and place indicated herein, which shall be enclosed in an opaque sealed envelope, marked with the title "Auditing Services – Merrick Square Community Development District" on the face of it. Please include pricing for each additional bond issuance.

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

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

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

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

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

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

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

- A. List the position or title of all personnel to perform work on the District audit. Include resumes for each person listed; list years of experience in present position for each party listed and years of related experience.
- B. Describe proposed staffing levels, including resumes with applicable certifications.
- C. Three references from projects of similar size and scope. The Proposer should include information relating to the work it conducted for each reference as well as a name, address and phone number of a contact person.
- D. The lump sum cost of the provision of the services under the proposal, plus the lump sum cost of four (4) annual renewals.

SECTION 13. PROTESTS. In accordance with the District's Rules of Procedure, any protest regarding the Proposal Documents, must be filed in writing, at the offices of the District Manager, within seventy-two (72) calendar hours (excluding Saturday, Sunday, and state holidays) after the receipt of the Proposal Documents. The formal protest setting forth with particularity the facts and law upon which the protest is based shall be filed within seven (7) calendar days (including Saturday, Sunday, and state holidays) after the initial notice of protest was filed. Failure to timely file a notice of protest or failure to timely file a formal written protest shall constitute a waiver of any right to object or protest with respect to the aforesaid Proposal Documents.

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

**MERRICK SQUARE COMMUNITY DEVELOPMENT DISTRICT
AUDITOR SELECTION
EVALUATION CRITERIA**

1. Ability of Personnel. (20 Points)

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

2. Proposer's Experience. (20 Points)

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

3. Understanding of Scope of Work. (20 Points)

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

4. Ability to Furnish the Required Services. (20 Points)

Extent to which the proposal demonstrates the adequacy of Proposer's financial resources and stability as a business entity necessary to complete the services required.

5. Price. (20 Points)***

Points will be awarded based upon the lowest total proposal for rendering the services and the reasonableness of the proposal.

Total (100 Points)

***Alternatively, the Board may choose to evaluate firms without considering price, in which case the remaining categories would be assigned 25 points each.

MERRICK SQUARE

COMMUNITY DEVELOPMENT DISTRICT

6C11



Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

Proposal to Provide Financial Auditing Services:

MERRICK SQUARE
COMMUNITY DEVELOPMENT DISTRICT

Proposal Due: February 24, 2023
12:00PM

Submitted to:

Merrick Square
Community Development District
c/o District Manager
2300 Glades Road, Suite 410W
Boca Raton, Florida 33431

Submitted by:

Antonio J. Grau, Partner
Grau & Associates
951 Yamato Road, Suite 280
Boca Raton, Florida 33431

Tel (561) 994-9299
(800) 229-4728

Fax (561) 994-5823

tgrau@graucpa.com

www.graucpa.com



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Grau & Associates

CERTIFIED PUBLIC ACCOUNTANTS

February 24, 2023

Merrick Square Community Development District
c/o District Manager
2300 Glades Road, Suite 410W
Boca Raton, Florida 33431

Re: Request for Proposal for Professional Auditing Services for the fiscal year ended September 30, 2022, with an option for additional annual renewals.

Grau & Associates (Grau) welcomes the opportunity to respond to the Merrick Square Community Development District's (the "District") Request for Proposal (RFP), and we look forward to working with you on your audit. We are an energetic and robust team of knowledgeable professionals and are a recognized leader of providing services to Community Development Districts. As one of Florida's few firms to primarily focus on government, we are especially equipped to provide you an effective and efficient audit.

Special district audits are at the core of our practice: **we have a total of 360 clients, 329 or 91% of which are special districts.** We know the specifics of the professional services and work products needed to meet your RFP requirements like no other firm. With this level of experience, we are able to increase efficiency, to provide immediate and continued savings, and to minimize disturbances to client operations.

Why Grau & Associates:

Knowledgeable Audit Team

Grau is proud that the personnel we assign to your audit are some of the most seasoned auditors in the field. Our staff performs governmental engagements year round. When not working on your audit, your team is refining their audit approach for next year's audit. Our engagement partners have decades of experience and take a hands-on approach to our assignments, which all ensures a smoother process for you.

Servicing your Individual Needs

Our clients enjoy personalized service designed to satisfy their unique needs and requirements. Throughout the process of our audit, you will find that we welcome working with you to resolve any issues as swiftly and easily as possible. In addition, due to Grau's very low turnover rate for our industry, you also won't have to worry about retraining your auditors from year to year.

Developing Relationships

We strive to foster mutually beneficial relationships with our clients. We stay in touch year round, updating, collaborating and assisting you in implementing new legislation, rules and standards that affect your organization. We are also available as a sounding board and assist with technical questions.

Maintaining an Impeccable Reputation

We have never been involved in any litigation, proceeding or received any disciplinary action. Additionally, we have never been charged with, or convicted of, a public entity crime of any sort. We are financially stable and have never been involved in any bankruptcy proceedings.

Complying With Standards

Our audit will follow the Auditing Standards of the AICPA, Generally Accepted Government Auditing Standards, issued by the Comptroller General of the United States, and the Rules of the Auditor General of the State of Florida, and any other applicable federal, state and local regulations. We will deliver our reports in accordance with your requirements.

This proposal is a firm and irrevocable offer for 90 days. We certify this proposal is made without previous understanding, agreement or connection either with any previous firms or corporations offering a proposal for the same items. We also certify our proposal is in all respects fair, without outside control, collusion, fraud, or otherwise illegal action, and was prepared in good faith. Only the person(s), company or parties interested in the project as principals are named in the proposal. Grau has no existing or potential conflicts and anticipates no conflicts during the engagement. Our Federal I.D. number is 20-2067322.

We would be happy to answer any questions or to provide any additional information. We are genuinely excited about the prospect of serving you and establishing a long-term relationship. Please do not hesitate to call or email either of our Partners, Antonio J. Grau, CPA (tgrau@graucpa.com) or Racquel McIntosh, CPA (rmcintosh@graucpa.com) at 561.994.9299. We thank you for considering our firm's qualifications and experience.

Very truly yours,
Grau & Associates



Antonio J. Grau

Firm Qualifications



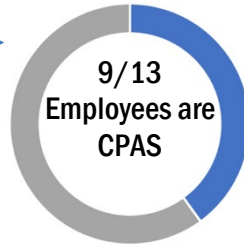
Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

Grau's Focus and Experience

Our Team



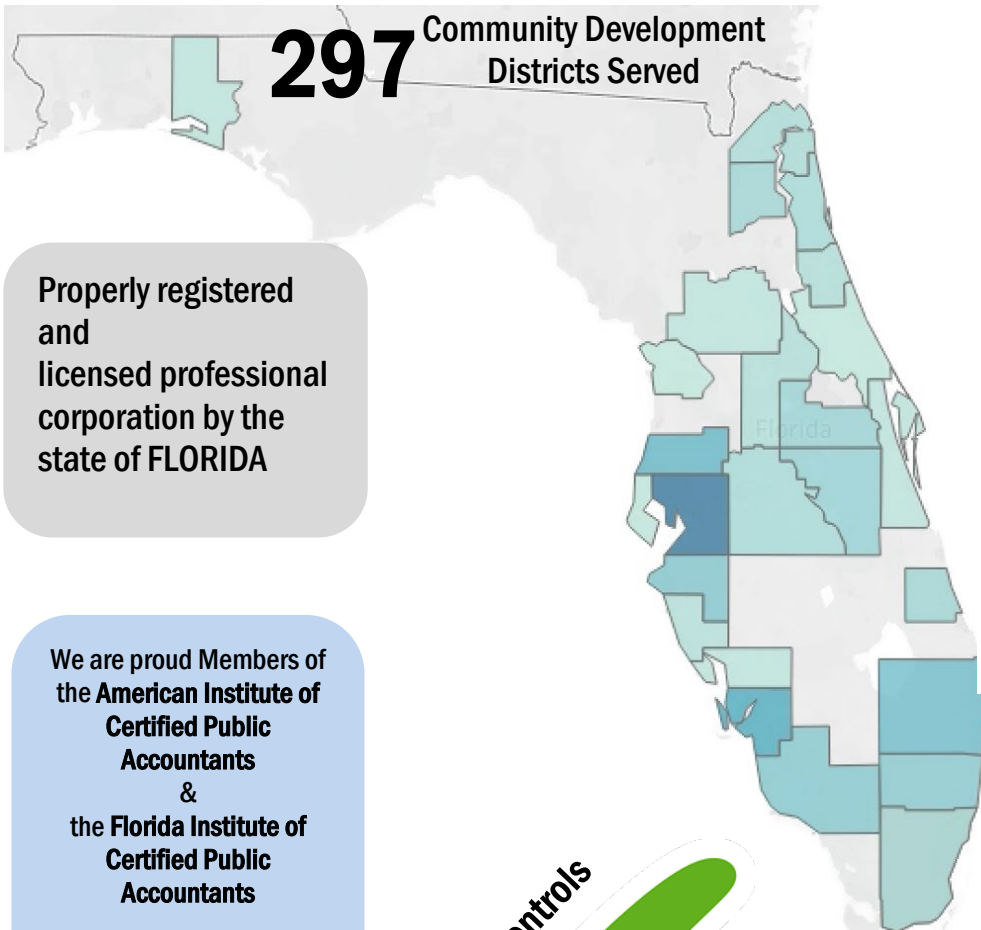
3 Partners
10 Professional Staff
2 Administrative Professionals



2005

Year founded

Services Provided



Properly registered and licensed professional corporation by the state of FLORIDA

We are proud Members of the **American Institute of Certified Public Accountants** & the **Florida Institute of Certified Public Accountants**

Quality Controls

- ⇒ External quality review program: consistently receives a pass
- ⇒ Internal: ongoing monitoring to maintain quality



AICPA | FICPA | GFOA | FASD | FGFOA

See next page for report and certificate



FICPA Peer Review Program
Administered in Florida
by The Florida Institute of CPAs



Peer Review
Program

AICPA Peer Review Program
Administered in Florida
by the Florida Institute of CPAs

February 20, 2020

Antonio Grau
Grau & Associates
951 Yamato Rd Ste 280
Boca Raton, FL 33431-1809

Dear Antonio Grau:

It is my pleasure to notify you that on February 20, 2020, the Florida Peer Review Committee accepted the report on the most recent System Review of your firm. The due date for your next review is December 31, 2022. This is the date by which all review documents should be completed and submitted to the administering entity.

As you know, the report had a peer review rating of pass. The Committee asked me to convey its congratulations to the firm.

Thank you for your cooperation.

Sincerely,
FICPA Peer Review Committee

Peer Review Team
FICPA Peer Review Committee
paul@ficpa.org
800-342-3197 ext. 251

Florida Institute of CPAs

cc: Daniel Hevia, Racquel McIntosh

Firm Number: 900004390114

Review Number: 571202

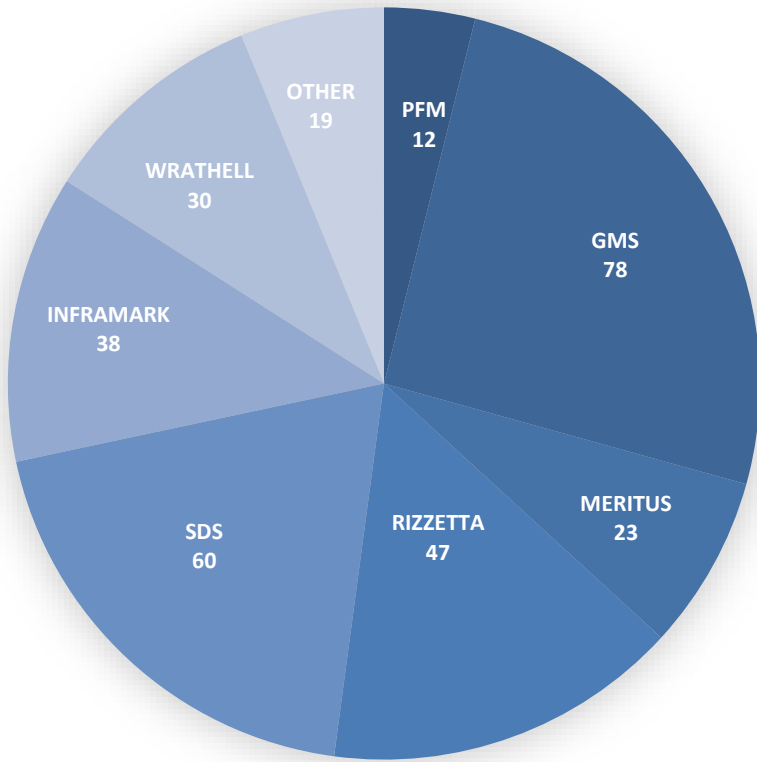
3800 Esplanade Way, Suite 210 | Tallahassee, FL 32311 | 800.342.3197, in Florida | 850.224.2727 | Fax: 850.222.8190 | www.ficpa.org

Firm & Staff Experience



Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

GRAU AND ASSOCIATES COMMUNITY DEVELOPMENT DISTRICT EXPERIENCE BY MANAGEMENT COMPANY



Profile Briefs:

Antonio J GRAU, CPA (Partner)

*Years Performing Audits: 35+
CPE (last 2 years): Government Accounting, Auditing: 40 hours; Accounting, Auditing and Other: 53 hours
Professional Memberships: AICPA, FICPA, FGFOA, GFOA*

Racquel McIntosh, CPA (Partner)

*Years Performing Audits: 18+
CPE (last 2 years): Government Accounting, Auditing: 61 hours; Accounting, Auditing and Other: 30 hours
Professional Memberships: AICPA, FICPA, FGFOA, FASD*

“Here at Grau & Associates, staying up to date with the current technological landscape is one of our top priorities. Not only does it provide a more positive experience for our clients, but it also allows us to perform a more effective and efficient audit. With the every changing technology available and utilized by our clients, we are constantly innovating our audit process.”

- Tony Grau

“Quality audits and exceptional client service are at the heart of every decision we make. Our clients trust us to deliver a quality audit, adhering to high standards and assisting them with improvements for their organization.”

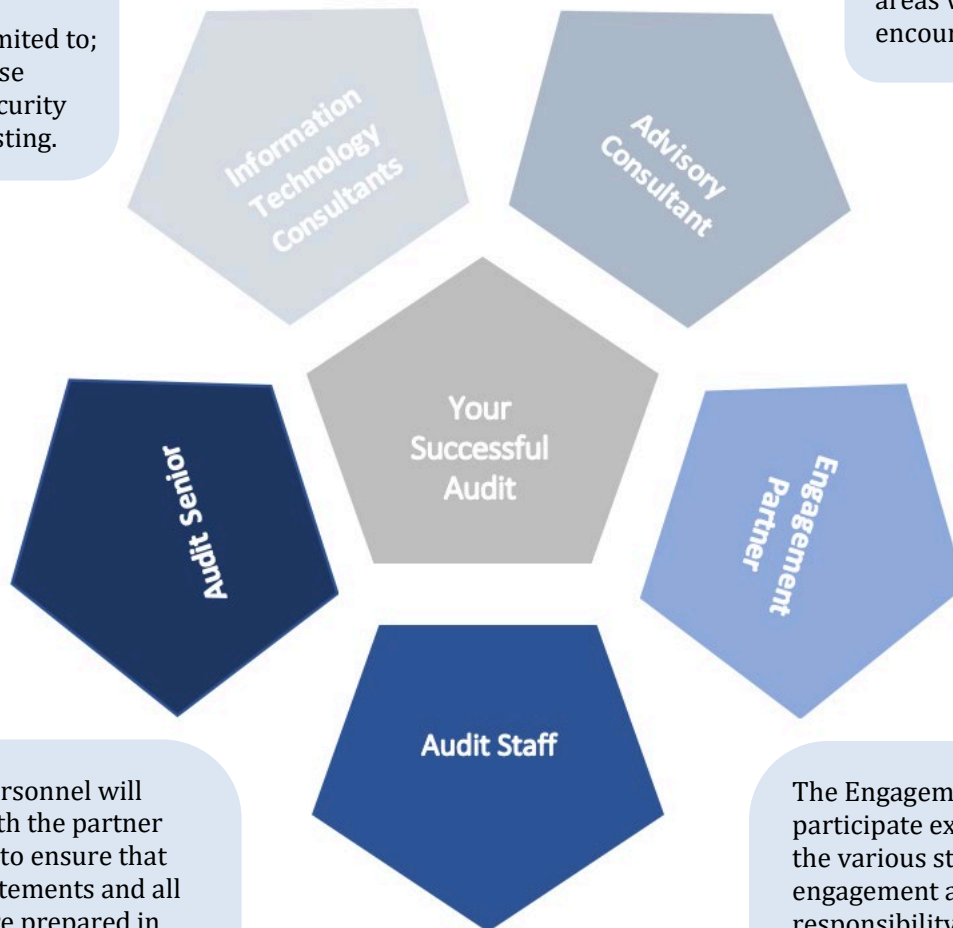
-Racquel McIntosh

YOUR ENGAGEMENT TEAM

Grau's client-specific engagement team is meticulously organized in order to meet the unique needs of each client. Constant communication within our solution team allows for continuity of staff and audit team.

Grau contracts with an outside group of IT management consultants to assist with matters including, but not limited to; network and database security, internet security and vulnerability testing.

An advisory consultant will be available as a sounding board to advise in those areas where problems are encountered.



The assigned personnel will work closely with the partner and the District to ensure that the financial statements and all other reports are prepared in accordance with professional standards and firm policy. Responsibilities will include planning the audit; communicating with the client and the partners the progress of the audit; and determining that financial statements and all reports issued by the firm are accurate, complete and are prepared in accordance with professional standards and firm policy.

The Engagement Partner will participate extensively during the various stages of the engagement and has direct responsibility for engagement policy, direction, supervision, quality control, security, confidentiality of information of the engagement and communication with client personnel. The engagement partner will also be involved directing the development of the overall audit approach and plan; performing an overriding review of work papers and ascertain client satisfaction.



Antonio 'Tony' J. Grau, CPA Partner

Contact: tgrau@graucpa.com | (561) 939-6672

Experience

For over 30 years, Tony has been providing audit, accounting and consulting services to the firm's governmental, non-profit, employee benefit, overhead and arbitrage clients. He provides guidance to clients regarding complex accounting issues, internal controls and operations.

As a member of the Government Finance Officers Association Special Review Committee, Tony participated in the review process for awarding the GFOA Certificate of Achievement in Financial Reporting. Tony was also the review team leader for the Quality Review of the Office of Management Audits of School Board of Miami-Dade County. Tony received the AICPA advanced level certificate for governmental single audits.

Education

University of South Florida (1983)
Bachelor of Arts
Business Administration

Clients Served (partial list)

(>300) Various Special Districts, including:

- | | |
|--|--|
| Bayside Improvement Community Development District | St. Lucie West Services District |
| Dunes Community Development District | Ave Maria Stewardship Community District |
| Fishhawk Community Development District (I, II, IV) | Rivers Edge II Community Development District |
| Grand Bay at Doral Community Development District | Bartram Park Community Development District |
| Heritage Harbor North Community Development District | Bay Laurel Center Community Development District |
| | |
| Boca Raton Airport Authority | |
| Greater Naples Fire Rescue District | |
| Key Largo Wastewater Treatment District | |
| Lake Worth Drainage District | |
| South Indian River Water Control | |

Professional Associations/Memberships

American Institute of Certified Public Accountants Florida Government Finance Officers Association
Florida Institute of Certified Public Accountants Government Finance Officers Association Member
City of Boca Raton Financial Advisory Board Member

Professional Education (over the last two years)

<u>Course</u>	<u>Hours</u>
Government Accounting and Auditing	40
Accounting, Auditing and Other	53
Total Hours	93 (includes of 4 hours of Ethics CPE)



Racquel C. McIntosh, CPA

Partner

Contact : rmcintosh@graucpa.com | (561) 939-666

Experience

Racquel has been providing government audit, accounting and advisory services to our clients for over 14 years. She serves as the firm’s quality control partner; in this capacity she closely monitors engagement quality ensuring standards are followed and maintained throughout the audit.

Racquel develops in-house training seminars on current government auditing, accounting, and legislative topics and also provides seminars for various government organizations. In addition, she assists clients with implementing new accounting software, legislation, and standards.

Education

- Florida Atlantic University (2004)
Master of Accounting
- Florida Atlantic University (2003)
Bachelor of Arts:
Finance, Accounting

Clients Served (partial list)

(>300) Various Special Districts, including:
 Carlton Lakes Community Development District
 Golden Lakes Community Development District
 Rivercrest Community Development District
 South Fork III Community Development District
 TPOST Community Development District

Westchase Community Development District
 Monterra Community Development District
 Palm Coast Park Community Development District
 Long Leaf Community Development District
 Watergrass Community Development District

East Central Regional Wastewater Treatment Facilities
 Indian Trail Improvement District
 Pinellas Park Water Management District
 Ranger Drainage District
 South Trail Fire Protection and Rescue Service District

Professional Associations/ Memberships

- American Institute of Certified Public Accountants
- Florida Institute of Certified Public Accountants
- FICPA State & Local Government Committee
- FGFOA Palm Beach Chapter

Professional Education (over the last two years)

<u>Course</u>	<u>Hours</u>
Government Accounting and Auditing	61
Accounting, Auditing and Other	30
Total Hours	<u>91</u> (includes of 4 hours of Ethics CPE)

References



Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

We have included three references of government engagements that require compliance with laws and regulations, follow fund accounting, and have financing requirements, which we believe are similar to the District.

Dunes Community Development District

Scope of Work	Financial audit
Engagement Partner	Antonio J. Grau
Dates	Annually since 1998
Client Contact	Darrin Mossing, Finance Director 475 W. Town Place, Suite 114 St. Augustine, Florida 32092 904-940-5850

Two Creeks Community Development District

Scope of Work	Financial audit
Engagement Partner	Antonio J. Grau
Dates	Annually since 2007
Client Contact	William Rizzetta, President 3434 Colwell Avenue, Suite 200 Tampa, Florida 33614 813-933-5571

Journey's End Community Development District

Scope of Work	Financial audit
Engagement Partner	Antonio J. Grau
Dates	Annually since 2004
Client Contact	Todd Wodraska, Vice President 2501 A Burns Road Palm Beach Gardens, Florida 33410 561-630-4922

Specific Audit Approach



Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

AUDIT APPROACH

Grau's Understanding of Work Product / Scope of Services:

We recognize the District is an important entity and we are confident our firm is eminently qualified to meet the challenges of this engagement and deliver quality audit services. ***You would be a valued client of our firm and we pledge to commit all firm resources to provide the level and quality of services (as described below) which not only meet the requirements set forth in the RFP but will exceed those expectations.*** Grau & Associates fully understands the scope of professional services and work products requested. Our audit will follow the Auditing Standards of the AICPA, *Generally Accepted Government Auditing Standards*, issued by the Comptroller General of the United States, and the Rules of the Auditor General of the State of Florida and any other applicable Federal, State or Local regulations. **We will deliver our reports in accordance with your requirements.**

Proposed segmentation of the engagement

Our approach to the audit engagement is a risk-based approach which integrates the best of traditional auditing techniques and a total systems concept to enable the team to conduct a more efficient and effective audit. The audit will be conducted in three phases, which are as follows:



Phase I - Preliminary Planning

A thorough understanding of your organization, service objectives and operating environment is essential for the development of an audit plan and for an efficient, cost-effective audit. During this phase, we will meet with appropriate personnel to obtain and document our understanding of your operations and service objectives and, at the same time, give you the opportunity to express your expectations with respect to the services that we will provide. Our work effort will be coordinated so that there will be minimal disruption to your staff.

During this phase we will perform the following activities:

- » Review the regulatory, statutory and compliance requirements. This will include a review of applicable federal and state statutes, resolutions, bond documents, contracts, and other agreements;
- » Read minutes of meetings;
- » Review major sources of information such as budgets, organization charts, procedures, manuals, financial systems, and management information systems;
- » Obtain an understanding of fraud detection and prevention systems;
- » Obtain and document an understanding of internal control, including knowledge about the design of relevant policies, procedures, and records, and whether they have been placed in operation;
- » Assess risk and determine what controls we are to rely upon and what tests we are going to perform and perform test of controls;
- » Develop audit programs to incorporate the consideration of financial statement assertions, specific audit objectives, and appropriate audit procedures to achieve the specified objectives;
- » Discuss and resolve any accounting, auditing and reporting matters which have been identified.

Phase II – Execution of Audit Plan

The audit team will complete a major portion of transaction testing and audit requirements during this phase. The procedures performed during this period will enable us to identify any matter that may impact the completion of our work or require the attention of management. Tasks to be performed in Phase II include, but are not limited to the following:

- » Apply analytical procedures to further assist in the determination of the nature, timing, and extent of auditing procedures used to obtain evidential matter for specific account balances or classes of transactions;
- » Perform tests of account balances and transactions through sampling, vouching, confirmation and other analytical procedures; and
- » Perform tests of compliance.

Phase III - Completion and Delivery

In this phase of the audit, we will complete the tasks related to year-end balances and financial reporting. All reports will be reviewed with management before issuance, and the partners will be available to meet and discuss our report and address any questions. Tasks to be performed in Phase III include, but are not limited to the following:

- » Perform final analytical procedures;
- » Review information and make inquiries for subsequent events; and
- » Meeting with Management to discuss preparation of draft financial statements and any potential findings or recommendations.

You should expect more from your accounting firm than a signature in your annual financial report. Our concept of truly responsive professional service emphasizes taking an active interest in the issues of concern to our clients and serving as an effective resource in dealing with those issues. In following this approach, we not only audit financial information with hindsight but also consider the foresight you apply in managing operations.

Application of this approach in developing our management letter is particularly important given the increasing financial pressures and public scrutiny facing today's public officials. We will prepare the management letter at the completion of our final procedures.

In preparing this management letter, we will initially review any draft comments or recommendations with management. In addition, we will take necessary steps to ensure that matters are communicated to those charged with governance.

In addition to communicating any recommendations, we will also communicate the following, if any:

- » Significant audit adjustments;
- » Significant deficiencies or material weaknesses;
- » Disagreements with management; and
- » Difficulties encountered in performing the audit.

Our findings will contain a statement of condition describing the situation and the area that needs strengthening, what should be corrected and why. Our suggestions will withstand the basic tests of corrective action:

Is the recommendation cost effective?

Is the recommendation the simplest to effectuate in order to correct a problem?

Is the recommendation at the heart of the problem and not just correcting a symptomatic matter?

Is the corrective action taking into account why the deficiency occurred?

To assure full agreement with facts and circumstances, we will fully discuss each item with Management prior to the final exit conference. This policy means there will be no “surprises” in the management letter and fosters a professional, cooperative atmosphere.

Communications

We emphasize a continuous, year-round dialogue between the District and our management team. We regularly communicate through personal telephone calls and electronic mail throughout the audit and on a regular basis.

Our clients have the ability to transmit information to us on our secure client portal with the ability to assign different staff with separate log on and viewing capability. This further facilitates efficiency as all assigned users receive electronic mail notification as soon as new information has been posted into the portal.

Cost of Services



Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

Our proposed all-inclusive fees for the financial audit for the fiscal years ended September 30, 2022-2026 are as follows:

Year Ended September 30,	Fee
2022	\$2,800
2023	\$2,900
2024	\$3,000
2025	\$3,100
2026	<u>\$3,200</u>
TOTAL (2022-2026)	<u>\$15,000</u>

The above fees are based on the assumption that the District maintains its current level of operations. Should conditions change or Bonds are issued the fees would be adjusted accordingly upon approval from all parties concerned. If Bonds are issued the fee would increase by \$1,500. The fee for subsequent annual renewals would be agreed upon separately.

Supplemental Information



Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

PARTIAL LIST OF CLIENTS

SPECIAL DISTRICTS	Governmental Audit	Single Audit	Utility Audit	Current Client	Year End
Boca Raton Airport Authority	✓	✓		✓	9/30
Captain's Key Dependent District	✓			✓	9/30
Central Broward Water Control District	✓			✓	9/30
Collier Mosquito Control District	✓			✓	9/30
Coquina Water Control District	✓			✓	9/30
East Central Regional Wastewater Treatment Facility	✓		✓		9/30
Florida Green Finance Authority	✓				9/30
Greater Boca Raton Beach and Park District	✓			✓	9/30
Greater Naples Fire Control and Rescue District	✓	✓		✓	9/30
Green Corridor P.A.C.E. District	✓			✓	9/30
Hobe-St. Lucie Conservancy District	✓			✓	9/30
Indian River Mosquito Control District	✓				9/30
Indian Trail Improvement District	✓			✓	9/30
Key Largo Wastewater Treatment District	✓	✓	✓	✓	9/30
Lake Padgett Estates Independent District	✓			✓	9/30
Lake Worth Drainage District	✓			✓	9/30
Loxahatchee Groves Water Control District	✓				9/30
Old Plantation Control District	✓			✓	9/30
Pal Mar Water Control District	✓			✓	9/30
Pinellas Park Water Management District	✓			✓	9/30
Pine Tree Water Control District (Broward)	✓			✓	9/30
Pinetree Water Control District (Wellington)	✓				9/30
Ranger Drainage District	✓	✓		✓	9/30
Renaissance Improvement District	✓			✓	9/30
San Carlos Park Fire Protection and Rescue Service District	✓			✓	9/30
Sanibel Fire and Rescue District	✓			✓	9/30
South Central Regional Wastewater Treatment and Disposal Board	✓			✓	9/30
South-Dade Venture Development District	✓			✓	9/30
South Indian River Water Control District	✓	✓		✓	9/30
South Trail Fire Protection & Rescue District	✓			✓	9/30
Spring Lake Improvement District	✓			✓	9/30
St. Lucie West Services District	✓		✓	✓	9/30
Sunshine Water Control District	✓			✓	9/30
West Villages Improvement District	✓			✓	9/30
Various Community Development Districts (297)	✓			✓	9/30
TOTAL	332	5	3	327	

ADDITIONAL SERVICES

CONSULTING / MANAGEMENT ADVISORY SERVICES

Grau & Associates also provide a broad range of other management consulting services. Our expertise has been consistently utilized by Governmental and Non-Profit entities throughout Florida. Examples of engagements performed are as follows:

- Accounting systems
- Development of budgets
- Organizational structures
- Financing alternatives
- IT Auditing
- Fixed asset records
- Cost reimbursement
- Indirect cost allocation
- Grant administration and compliance

ARBITRAGE

The federal government has imposed complex rules to restrict the use of tax-exempt financing. Their principal purpose is to eliminate any significant arbitrage incentives in a tax-exempt issue. We have determined the applicability of these requirements and performed the rebate calculations for more than 150 bond issues, including both fixed and variable rate bonds.

73 Current
Arbitrage
Calculations

We look forward to providing Merrick Square Community Development District with our resources and experience to accomplish not only those minimum requirements set forth in your Request for Proposal, but to exceed those expectations!

**For even more information on Grau & Associates
please visit us on www.graucpa.com.**

MERRICK SQUARE

COMMUNITY DEVELOPMENT DISTRICT

6D

MERRICK SQUARE COMMUNITY DEVELOPMENT DISTRICT

AUDITOR EVALUATION MATRIX

RFP FOR ANNUAL AUDIT SERVICES	ABILITY OF PERSONNEL	PROPOSER'S EXPERIENCE	UNDERSTANDING OF SCOPE OF WORK	ABILITY TO FURNISH REQUIRED SERVICES	PRICE	TOTAL POINTS
PROPOSER	20 POINTS	20 POINTS	20 POINTS	20 POINTS	20 POINTS	100 POINTS
Berger, Toombs, Elam, Gaines & Frank						
Grau & Associates						

NOTES:

Completed by: _____

Board Member's Signature

Date: _____

Printed Name of Board Member

MERRICK SQUARE

COMMUNITY DEVELOPMENT DISTRICT

UNAUDITED FINANCIAL STATEMENTS

**MERRICK SQUARE
COMMUNITY DEVELOPMENT DISTRICT
FINANCIAL STATEMENTS
UNAUDITED
MARCH 31, 2023**

**MERRICK SQUARE
COMMUNITY DEVELOPMENT DISTRICT
BALANCE SHEET
GOVERNMENTAL FUNDS
MARCH 31, 2023**

	General Fund	Debt Service Fund	Total Governmental Funds
	<u> </u>	<u> </u>	<u> </u>
ASSETS			
Cash	\$ 6,765	\$ -	\$ 6,765
Due from Landowner	4,126	-	4,126
Total assets	<u>\$ 10,891</u>	<u>\$ -</u>	<u>\$ 10,891</u>
LIABILITIES AND FUND BALANCES			
Liabilities:			
Accounts payable	\$ 4,126	\$ -	\$ 4,126
Due to Landowner	765	25,000	25,765
Landowner advance	6,000	-	6,000
Total liabilities	<u>10,891</u>	<u>25,000</u>	<u>35,891</u>
DEFERRED INFLOWS OF RESOURCES			
Deferred receipts	4,126	-	4,126
Total deferred inflows of resources	<u>4,126</u>	<u>-</u>	<u>4,126</u>
Fund balances:			
Restricted for:			
Debt service	-	(25,000)	(25,000)
Unassigned	(4,126)	-	(4,126)
Total fund balances	<u>(4,126)</u>	<u>(25,000)</u>	<u>(29,126)</u>
Total liabilities, deferred inflows of resources and fund balances	<u>\$ 10,891</u>	<u>\$ -</u>	<u>\$ 10,891</u>

**MERRICK SQUARE
COMMUNITY DEVELOPMENT DISTRICT
GENERAL FUND
STATEMENT OF REVENUES, EXPENDITURES,
AND CHANGES IN FUND BALANCES
FOR THE PERIOD ENDED MARCH 31, 2023**

	<u>Current Month</u>	<u>Year to Date</u>	<u>Budget</u>	<u>% of Budget</u>
REVENUES				
Landowner contribution	\$ 2,058	\$ 17,552	\$ 103,750	17%
Total revenues	<u>2,058</u>	<u>17,552</u>	<u>103,750</u>	17%
EXPENDITURES				
Professional & administrative				
Management/accounting/recording	2,000	12,000	42,000	29%
Legal	2,060	3,630	25,000	15%
Engineering	-	-	3,000	0%
Audit	-	-	5,500	0%
Arbitrage rebate calculation	-	-	500	0%
Dissemination agent	-	-	1,000	0%
Trustee	-	-	5,500	0%
Telephone	17	100	200	50%
Postage	7	7	500	1%
Printing & binding	42	250	500	50%
Legal advertising	-	382	1,500	25%
Annual special district fee	-	175	175	100%
Insurance - GL and D&O	-	5,000	5,500	91%
Contingencies/bank charges	-	-	500	0%
Website hosting & maintenance	-	-	705	0%
Website ADA compliance	-	-	210	0%
Total professional & administrative	<u>4,126</u>	<u>21,544</u>	<u>92,290</u>	23%
Field operations				
Stormwater management				
Field management	-	-	2,000	0%
Wetland management	-	-	3,460	0%
Wetland monitoring	-	-	2,500	0%
Roadway maintenance	-	-	3,500	0%
Total field operations	<u>-</u>	<u>-</u>	<u>11,460</u>	
Total expenditures	<u>4,126</u>	<u>21,544</u>	<u>103,750</u>	21%
Excess/(deficiency) of revenues over/(under) expenditures	(2,068)	(3,992)	-	
Fund balances - beginning	(2,058)	(134)	-	
Fund balances - ending	<u>\$ (4,126)</u>	<u>\$ (4,126)</u>	<u>\$ -</u>	

**MERRICK SQUARE
COMMUNITY DEVELOPMENT DISTRICT
STATEMENT OF REVENUES, EXPENDITURES,
AND CHANGES IN FUND BALANCES
DEBT SERVICE FUND
FOR THE PERIOD ENDED MARCH 31, 2023**

	<u>Current Month</u>	<u>Year To Date</u>
REVENUES	<u>\$ -</u>	<u>\$ -</u>
Total revenues	<u>-</u>	<u>-</u>
 EXPENDITURES		
Debt service		
Total debt service	<u>-</u>	<u>-</u>
 Excess/(deficiency) of revenues over/(under) expenditures	 - -	 - -
 Fund balances - beginning	 <u>(25,000)</u>	 <u>(25,000)</u>
Fund balances - ending	<u><u>\$ (25,000)</u></u>	<u><u>\$ (25,000)</u></u>

MERRICK SQUARE

COMMUNITY DEVELOPMENT DISTRICT

MINUTES

DRAFT

**MINUTES OF MEETING
MERRICK SQUARE
COMMUNITY DEVELOPMENT DISTRICT**

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The Board of Supervisors of the Merrick Square Community Development District held a Regular Meeting on February 21, 2023 at 2:30 p.m., at the offices of D.R. Horton, 6123 Lyons Road, Coconut Creek, Florida 33073.

Present at the meeting were:

Karl Albertson	Vice Chair
Rebecca Cortes	Assistant Secretary
Darlene DePaula	Assistant Secretary
Horacio Gonzalez	Assistant Secretary

Also present were:

Daniel Rom	District Manager
Ginger Wald	District Counsel
Juan Alvarez (via phone)	District Engineer
Cynthia Wilhelm (via phone)	Bond Counsel

FIRST ORDER OF BUSINESS

Call to Order/Roll Call

Mr. Rom called the meeting to order at 2:32 p.m.

Supervisors Albertson, Cortes, DePaula and Gonzalez were present in person. Supervisor Tavel was not present.

SECOND ORDER OF BUSINESS

Public Comments

There were no public comments.

THIRD ORDER OF BUSINESS

**Consideration of Resolution 2023-02,
Designating Certain Officers of the District,
and Providing for an Effective Date**

38 Mr. Rom presented Resolution 2023-02. Mr. Albertson nominated the following slate of
39 officers:

- | | | |
|----|---------------------|------------------|
| 40 | Chair | Javi Tavel |
| 41 | Vice Chair | Karl Albertson |
| 42 | Assistant Secretary | Rebecca Cortes |
| 43 | Assistant Secretary | Horacio Gonzalez |
| 44 | Assistant Secretary | Darlene De Paula |
| 45 | Assistant Secretary | Daniel Rom |

46 No other nominations were made.

47 Prior appointments by the Board for Secretary, Treasurer and Assistant Treasurer
48 remain unaffected by this Resolution.

49

50 **On MOTION by Ms. Cortes and seconded by Mr. Gonzalez, with all in favor,**
 51 **Resolution 2023-02, Designating Certain Officers of the District, as nominated,**
 52 **and Providing for an Effective Date, was adopted.**

53

54

55 **FOURTH ORDER OF BUSINESS**

**Presentation of Supplemental Special
Assessment Methodology Report**

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57

58 Mr. Rom presented the Preliminary First Supplemental Special Assessment
59 Methodology Report dated February 21, 2023, which reflects minor changes to the Financing
60 Program as compared to the Master Assessment Methodology previously approved by the
61 Board.

62 Mr. Rom noted the following:

- 63 ➤ The CDD anticipates issuing Special Assessment Bonds in the estimated principal
64 amount of \$4,140,000 to fund an estimated \$3,712,454.00 in Capital Improvement Plan (CIP)
65 costs.

66 Discussion ensued regarding the costs of issuance.

67 Mr. Rom stated the Developer will fund a portion of the costs of issuance; there is no
68 Capitalized Interest Fund, as noted in Table 3.

- 69 ➤ The CDD will include 211 townhome units.

- 70 ➤ The total cost of the CIP is \$4,066,000.
- 71 ➤ The Annual Bond Assessment Debt Service per unit paid in March is \$1,459.57.
- 72 Discussion ensued regarding the exclusion of capitalized interest and the closing date.

73

74 **On MOTION by Mr. Gonzalez and seconded by Ms. Cortes, with all in favor, the**
 75 **Supplemental Special Assessment Methodology Report dated February 21,**
 76 **2023, was approved.**

77

78

FIFTH ORDER OF BUSINESS

Consideration of Resolution 2023-01, Delegating to the Chairman of the Board of Supervisors of Merrick Square Community Development District (the "District") the Authority to Approve the Sale, Issuance and Terms of Sale of Merrick Square Community Development District Capital Improvement Revenue Bonds, Series 2023, as a Single Series of Bonds Under the Master Trust Indenture (the "Series 2023 Bonds") in Order to Finance a Portion of the Costs of the Capital Improvement Plan; Establishing the Parameters for the Principal Amounts, Interest Rates, Maturity Dates, Redemption Provisions and Other Details Thereof; Approving the Form of and Authorizing the Chairman to Accept The Bond Purchase Contract for the Series 2023 Bonds; Approving a Negotiated Sale of the Series 2023 Bonds to the Underwriter; Approving the Forms of the Master Trust Indenture and First Supplemental Trust Indenture and Authorizing the Execution and Delivery Thereof by Certain Officers of the District; Appointing a Trustee, Paying Agent and Bond Registrar for the Series 2023 Bonds; Approving The Form of the Series 2023 Bonds; Approving the Form of and Authorizing the Use of the Preliminary Limited Offering Memorandum and Limited Offering Memorandum Relating to

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111 the Series 2023 Bonds; Approving the Form
112 of the Continuing Disclosure Agreement
113 Relating to the Series 2023 Bonds;
114 Authorizing Certain Officers of the District
115 to Take All Actions Required and to
116 Execute and Deliver All Documents,
117 Instruments and Certificates Necessary in
118 Connection with the Issuance, Sale and
119 Delivery of the Series 2023 Bonds;
120 Authorizing the Vice Chairman and
121 Assistant Secretaries to Act in the Stead of
122 the Chairman or the Secretary, as the Case
123 May Be; Specifying the Application of the
124 Proceeds of the Series 2023 Bonds;
125 Authorizing Certain Officers of the District
126 to Take All Actions and Enter into All
127 Agreements Required in Connection with
128 the Acquisition and Construction of the
129 Capital Improvement Plan; and Providing
130 an Effective Date

131
132 Ms. Wilhelm presented Resolution 2023-01, which accomplishes the following:

- 133 ➤ Delegates authority to the Chair to enter into the Bond Purchase Contract, so long as
134 the terms are within the parameters established.
- 135 ➤ Approves the forms of certain documents required to market, sell and issue the bonds,
136 including the Purchase Contract, Master and First Supplemental Trust Indenture, Preliminary
137 Limited Offering Memorandum and Continuing Disclosure Agreements.
- 138 ➤ Sets forth the parameters of the Series 2023 Bonds, which shall not-exceed the
139 maximum principal amount of \$5.3 million.
- 140 ➤ Sets forth the maximum coupon rate as the maximum statutory rate.
- 141 ➤ Sets forth the Underwriter's discount maximum amount of 2%.
- 142 ➤ Sets forth the maximum maturity date as the maximum allowed by law.
- 143 ➤ Sets forth the redemption provisions for the Series 2023 Bond, which was attached to
144 the form of the First Supplemental Indenture.

145

146 **On MOTION by Mr. Albertson and seconded by Mr. Gonzalez, with all in favor,**
 147 **Resolution 2023-01, Delegating to the Chairman of the Board of Supervisors of**
 148 **Merrick Square Community Development District (the "District") the Authority**
 149 **to Approve the Sale, Issuance and Terms of Sale of Merrick Square Community**
 150 **Development District Capital Improvement Revenue Bonds, Series 2023, as a**
 151 **Single Series of Bonds Under the Master Trust Indenture (the "Series 2023**
 152 **Bonds") in Order to Finance a Portion of the Costs of the Capital Improvement**
 153 **Plan; Establishing the Parameters for the Principal Amounts, Interest Rates,**
 154 **Maturity Dates, Redemption Provisions and Other Details Thereof; Approving**
 155 **the Form of and Authorizing the Chairman to Accept The Bond Purchase**
 156 **Contract for the Series 2023 Bonds; Approving a Negotiated Sale of the Series**
 157 **2023 Bonds to the Underwriter; Approving the Forms of the Master Trust**
 158 **Indenture and First Supplemental Trust Indenture and Authorizing the**
 159 **Execution and Delivery Thereof by Certain Officers of the District; Appointing a**
 160 **Trustee, Paying Agent and Bond Registrar for the Series 2023 Bonds; Approving**
 161 **The Form of the Series 2023 Bonds; Approving the Form of and Authorizing the**
 162 **Use of the Preliminary Limited Offering Memorandum and Limited Offering**
 163 **Memorandum Relating to the Series 2023 Bonds; Approving the Form of the**
 164 **Continuing Disclosure Agreement Relating to the Series 2023 Bonds;**
 165 **Authorizing Certain Officers of the District to Take All Actions Required and to**
 166 **Execute and Deliver All Documents, Instruments and Certificates Necessary in**
 167 **Connection with the Issuance, Sale and Delivery of the Series 2023 Bonds;**
 168 **Authorizing the Vice Chairman and Assistant Secretaries to Act in the Stead of**
 169 **the Chairman or the Secretary, as the Case May Be; Specifying the Application**
 170 **of the Proceeds of the Series 2023 Bonds; Authorizing Certain Officers of the**
 171 **District to Take All Actions and Enter into All Agreements Required in**
 172 **Connection with the Acquisition and Construction of the Capital Improvement**
 173 **Plan; and Providing an Effective Date, was adopted.**

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176 **SIXTH ORDER OF BUSINESS**

**Consideration of Ancillary Financing
Documents**

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179 Ms. Wald presented the following:

180 **A. Declaration of Consent**181 **B. Lien of Record**182 **C. True up Agreement**183 **D. Acquisition Agreement**184 **E. Collateral Assignment**185 **F. Completion Agreement**

186 Ms. Wald requested approval of the Ancillary Financing documents, in substantially final
187 form, pending review by Counsel for D.R. Horton and allowing for minor revisions and
188 corrections and insertion of final amounts at the pre-closing.

189 Mr. Albertson noted that the address for copies to be sent to Mark Karnes, Esq., is
190 incorrect. Each document will be corrected to reflect "1341 Horton Circle" as the address.

191 Ms. Wald noted that all scrivener's errors will be corrected and all final numbers
192 inserted before documents are circulated for final signature.

193

On MOTION by Mr. Albertson and seconded by Mr. Gonzalez, with all in favor, the Declaration of Consent, Lien of Record, True Up Agreement, Acquisition Agreement, Collateral Assignment and Completion Agreement, all in substantial form and as amended, and authorizing the Chair to execute, were approved.

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SEVENTH ORDER OF BUSINESS

Acceptance of Unaudited Financial Statements as of December 31, 2022

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203

204 Mr. Rom presented the Unaudited Financial Statements as of December 31, 2022.

205

On MOTION by Mr. Albertson and seconded by Mr. Gonzalez, with all in favor, the Unaudited Financial Statements as of December 31, 2022, were accepted.

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EIGHTH ORDER OF BUSINESS

Approval of August 16, 2022 Public Hearing and Regular Meeting Minutes

211
212

213 Mr. Rom presented the August 16, 2022 Public Hearing and Regular Meeting Minutes.

214

On MOTION by Mr. Gonzalez and seconded by Mr. Albertson, with all in favor, the August 16, 2022 Public Hearing and Regular Meeting Minutes, as presented, were approved.

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NINTH ORDER OF BUSINESS

Staff Reports

220
221

222 **A. District Counsel: *Billing, Cochran, Lyles, Mauro & Ramsey P.A.***

223 There was no report.

224 **B. District Engineer [Interim]: *Alvarez Engineers, Inc.***

225 There was no report.

226 **C. District Manager: *Wrathell, Hunt and Associates, LLC***

227 • **NEXT MEETING DATE: March 21, 2023 at 2:30 P.M.**

228 ○ **QUORUM CHECK**

229 Mr. Rom stated the March 21, 2023 will be cancelled, if not necessary.

230

231 **TENTH ORDER OF BUSINESS**

Board Members' Comments/Requests

232

233 There were no Board Members' comments or requests.

234

235 **ELEVENTH ORDER OF BUSINESS**

Public Comments

236

237 There were no public comments.

238

239 **TWELFTH ORDER OF BUSINESS**

Adjournment

240

241 **On MOTION by Mr. Albertson and seconded by Ms. Cortes, with all in favor,**
242 **the meeting adjourned at 2:51 p.m.**

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[SIGNATURES APPEAR ON FOLLOWING PAGE]

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Secretary/Assistant Secretary

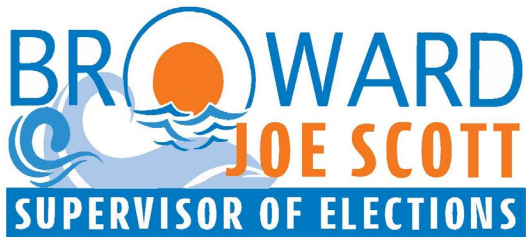
Chair/Vice Chair

MERRICK SQUARE

COMMUNITY DEVELOPMENT DISTRICT

STAFF

REPORTS



Joe Scott, Supervisor of Elections
115 S. Andrews Ave., Rm. 102
Fort Lauderdale, FL 33301
(954) 357-VOTE • www.browardvotes.gov

MEMORADUM

To: Daphne Gillyard
Director of Administrative Services

From: Patricia Santiago
Administration Director

Date: May 9, 2023

Subject: Number of Registered Voters Request

Pursuant to your request, please be advised that the number of registered voters as of April 15, 2023 in the Special District/Community Development District (CDD) requested is as follows:

Special District/CDD	# of Registered Voters
Merrick Square Community Development District	0

We hope this information has been of assistance to you.

MERRICK SQUARE COMMUNITY DEVELOPMENT DISTRICT**BOARD OF SUPERVISORS FISCAL YEAR 2022/2023 MEETING SCHEDULE****LOCATION***offices of D.R. Horton, 6123 Lyons Road, Coconut Creek, Florida 33073*

DATE	POTENTIAL DISCUSSION/FOCUS	TIME
October 18, 2022 CANCELED	Regular Meeting	2:30 PM
November 15, 2022 CANCELED	Regular Meeting	2:30 PM
December 20, 2022 CANCELED	Regular Meeting	2:30 PM
January 17, 2023 CANCELED	Regular Meeting	2:30 PM
February 21, 2023	Regular Meeting	2:30 PM
March 21, 2023 CANCELED	Regular Meeting	2:30 PM
April 18, 2023 CANCELED	Regular Meeting	2:30 PM
May 16, 2023	Regular Meeting	2:30 PM
June 20, 2023	Regular Meeting	2:30 PM
July 18, 2023	Regular Meeting	2:30 PM
August 15, 2023	Regular Meeting	2:30 PM
September 19, 2023	Regular Meeting	2:30 PM