



Rizzetta & Company

Heritage Landing Community Development District

**Board of Supervisors' Meeting
June 12, 2025**

**District Office:
2806 N. Fifth Street
Unit 403
St. Augustine, FL 32084**

www.heritagelandingcdd.org

HERITAGE LANDING COMMUNITY DEVELOPMENT DISTRICT

District Office · St. Augustine, Florida · (904) 436-6270
Mailing Address – 3434 Colwell Avenue, Suite 200, Tampa, Florida 33614
www.heritagelandingcdd.org

Board of Supervisors	Kevin Austin Christine Mallatt Robert Och Achara Tarfa Michael Taylor	Chairman Vice Chairman Assistant Secretary Assistant Secretary Assistant Secretary
District Manager	Melissa Dobbins	Rizzetta & Company, Inc.
District Counsel	Wes Haber	Kutak Rock LLP
District Engineer	Alex Acree	Matthews Design Group

All cellular phones must be placed on mute while in the meeting room.

The Audience Comments portion, on Agenda Items Only, will be held at the beginning of the meeting. The Audience Comments portion of the agenda, on General Items, will be held at the end of the meeting. During these portions of the agenda, audience members may make comments on matters that concern the District (CDD) and will be limited to a total of three (3) minutes to make their comments.

Pursuant to provisions of the Americans with Disabilities Act, any person requiring special accommodations to participate in this meeting/hearing/workshop is asked to advise the District Office at least forty-eight (48) hours before the meeting/hearing/workshop by contacting the District Manager at (239) 936-0913. If you are hearing or speech impaired, please contact the Florida Relay Service by dialing 7-1-1, or 1-800-955-8771 (TTY) 1-800-955-8770 (Voice), who can aid you in contacting the District Office.

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

HERITAGE LANDING COMMUNITY DEVELOPMENT DISTRICT

District Office · St. Augustine, Florida · (904) 436-6270
Mailing Address · 3434 Colwell Avenue, Suite 200, Tampa, Florida 33614
www.heritagelandingcdd.org

Board of Supervisors
Heritage Landing Community
Development District

June 5, 2025

FINAL AGENDA

Dear Board Members:

The **regular** meeting of the Board of Supervisors of the Heritage Landing Community Development District will be held on **June 12, 2025, at 1:00 p.m.** at the Heritage Landing Amenity Center, located at 370 Heritage Landing Parkway, St. Augustine, Florida 32092.

1. **CALL TO ORDER/ROLL CALL**
2. **AUDIENCE COMMENTS ON AGENDA ITEMS**
3. **BUSINESS ADMINISTRATION**
 - A. Consent Agenda.....Tab 1
 - 1.) Consideration of the Minutes of the Board of Supervisors' Meeting held on May 8, 2025
 - 2.) Ratification of the Operation and Maintenance Expenditures for April 2025
4. **STAFF REPORTS - PART A**
 - A. District Engineer
 - B. Landscape and Maintenance.....Tab 2
 - 1.) Consideration of Landscape Enhancement Proposals
5. **BUSINESS ITEMS**
 - A. Acceptance of Annual Engineer Report – *(Under Separate Cover)*
 - B. Review Amenity Suspension
 - C. Discussion Regarding Fire Sprinkler System with Wayne Automatic
 - D. Review of Landscape Maintenance RFP Proposals
 - E. Review of Amenity Management RFP Scope.....Tab 3
 - F. Consideration of Resolution 2025-05, Setting Hearing on Revised Amenity Rates.....Tab 4
 - 1.) Rental Area Info Surrounding CDDs
 - 2.) Review of Credit Card Payment Options
 - G. Consideration of Audit Committee Recommendation
6. **STAFF REPORTS PART - B**
 - A. District Counsel
 - 1.) Discussion on Impacts to District Owned Conservation Property
 - B. Amenity Center and Field Maintenance.....Tab 5
 - 1.) Amenity Manager Report
 - 2.) Field Manager Report
 - 3.) Charles Aquatics Report
 - C. District Manager
7. **AUDIENCE COMMENTS AND SUPERVISOR REQUESTS**
8. **ADJOURNMENT**

I look forward to seeing you at the meeting. In the meantime, if you have any questions, please do not hesitate to contact me at (904) 436-6270.

Very truly yours, *Melissa Dobbins* District Manager

Tab 1

1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
17
18
19
20
21
22
23
24
25
26
27
28
29
30
31
32
33
34
35
36
37
38
39
40
41
42
43
44
45
46
47
48
49

MINUTES OF MEETING

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

**HERITAGE LANDING
COMMUNITY DEVELOPMENT DISTRICT**

The **regular** meeting of the Heritage Landing Community Development District was held on **May 8, 2025, at 6:00 p.m.** at the Heritage Landing Amenity Center, located at 370 Heritage Landing Parkway, St. Augustine, Florida 32092.

Present and constituting a quorum:

- | | |
|-------------------|--|
| Kevin Austin | Board Supervisor, Chairman |
| Christine Mallatt | Board Supervisor, Vice Chairperson |
| Robert Och | Board Supervisor, Assistant Secretary |
| Achara Tarfa | Board Supervisor, Assistant Secretary |
| Micheal Taylor | Board Supervisor, Assistant Secretary |

Also present were:

- | | |
|-----------------|--|
| Melissa Dobbins | District Manager, Rizzetta & Company, Inc. |
| Wes Haber | District Counsel, Kutak Rock LLC <i>(via speaker phone)</i> |
| Lourens Erasmus | General Manager, Vesta Property Services |
| Jay King | Vice President, Vesta Property Services |
| Steve McAvoy | BrightView Landscape |

Audience Members present and on Zoom.

FIRST ORDER OF BUSINESS

CALL TO ORDER

SECOND ORDER OF BUSINESS

**PUBLIC COMMENTS ON
AGENDA ITEMS**

There were no audience comments.

THIRD ORDER OF BUSINESS

CONSENT AGENDA

A. Consent Agenda

- 1.) Consideration of the Minutes of the Board of Supervisors' Meeting held on April 10, 2025**

50
51
52
53
54

- 2.) **Consideration of the Minutes of the Board of Supervisors’ Workshop held on April 23, 2025**
- 3.) **Ratification of the Operation and Maintenance Expenditures for March 2025**

On a motion by Ms. Mallat, seconded by Mr. Taylor, with all in favor, the Board approved the Consent Agenda Items; minutes for the Board of Supervisors’ meeting minutes held on April 10, 2025, minutes for the Board of Supervisors Workshop held on April 23, 2025, and ratified the Operation and Maintenance Expenditures for March 2025 in the amount of \$67,317.79, for the Heritage Landing Community Development District.

55
56
57
58
59
60
61
62
63
64
65
66
67
68
69
70
71
72
73
74

FOURTH ORDER OF BUSINESS

STAFF REPORTS - PART A

A. District Engineer

1.) Consideration of District Engineer Annual Report Proposal

The District Engineer was not present. The board did request staff to review with him to confirm if the county would require a permit if pavers were to be added adjacent to the roundabout.

The board also requested counsel to confirm if the District Engineer had to perform the annual inspection and report that is required to be submitted to the Trustee. After review, Mr. Haber confirmed the report needed to be completed by an engineer, but it didn’t have to be the District Engineer representing the district.

The board discussed concerns regarding the cost of the proposal under Tab 2 from Matthews to provide the annual report and requested staff to reach out to other engineers for additional proposals.

On a motion by Mr. Och, seconded by Mr. Taylor, with all in favor the Board authorized Mr. Austin to approve a proposal to complete the 2025 Engineer Report with a not to exceed \$6,000.00, for the Heritage Landing Community Development District.

75
76
77
78
79
80
81
82
83
84
85
86
87
88
89

B. Landscape and Maintenance

The board reviewed photos of landscape areas that may need improvements. After discussion, the board agreed to request proposals regarding pavers at the “bus-stop” and for sod next to the median. The area under the tree by the roundabout was tabled.

FIFTH ORDER OF BUSINESS

CONSIDERATION OF LANDSCAPE & IRRIGATION RFP PROPOSALS

The board tabled the review until the June meeting.

90 **SIXTH ORDER OF BUSINESS**

**CONSIDERATION OF
SIDEWALK REPAIR
PROPOSALS**

91
92
93
On a motion by Mr. Austin, seconded by Ms. Tarfa, by majority vote, Mr. Taylor opposed, the Board approved 2 Men Concrete proposal in the amount of \$10,245.00, for the Heritage Landing Community Development District.

94 **SEVENTH ORDER OF BUSINESS**

**CONSIDERATION OF POND
AQUATICS & FOUNTAIN
MAINTENANCE RENEWAL
PROPOSAL**

95
96
97
98
99
On a motion by Mr. Taylor, seconded by Mr. Och, with all in favor the Board approved Charles Aquatics Pond and Fountain Maintenance Proposal with zero increase for a 4-year term, for the Heritage Landing Community Development District.

100 **EIGHTH ORDER OF BUSINESS**

**CONSIDERATION OF POOL
FURNITURE PROPOSAL**

101
102
103
On a motion by Ms. Tarfa, seconded by Mr. Och, by majority vote, Ms. Mallatt and Mr. Taylor opposed, the Board approved staff to purchase two umbrellas and four chairs per the proposal under Tab 6, for the Heritage Landing Community Development District.

104 **NINTH ORDER OF BUSINESS**

**DISCUSSION REGARDING
AMENITY MANAGEMENT RFP**

105
106
107
108 After discussion, the board agreed to move forward with requesting proposals for
109 Amenity Management Services. The board requested to review scope of services at the
110 June meeting for the RFP package.

111 **TENTH ORDER OF BUSINESS**

**PRESENTATION OF
PROPOSED BUDGET FOR
FISCAL YEAR 2025/2026**

112
113
114
115
116 **1.) Consideration of Resolution 2025-04; Approving Fiscal Year 2025/2026**
117 **Proposed Budget & Setting Public Hearing**

118
119 The board discussed concerns with the fire sprinkler system and the options of
120 making repairs verse redoing the entire system. The board directed staff to get
121 proposals to redo the system and to add \$100,000.00 into the Capital Reserves
122 proposed budget line as a placeholder until actual cost are reviewed.

123
124 Ms. Dobbins updated the board this change would set the FY 26 Proposed
125 Budget Annual Assessment increase CAP to \$255.16. She then reminded the board
126 that further discussions will be held at the August 14th budget public hearing for them to
127 confirm if that annual assessment increase amount will stay the same or decrease.

128

On a motion by Mr. Austin, seconded by Ms. Mallatt, by majority vote, Ms. Tarfa opposed, the Board adopted Res. 2025-04, Approving FY 2025-2026 Proposed Budget & Setting Public Hearing, for the Heritage Landing Community Development District.

129

130

ELEVENTH ORDER OF BUSINESS

STAFF REPORTS PART - B

131

A. District Counsel

132

133

134

1.) Waiver of Conflict

135

136

137

138

139

140

Mr. Haber reviewed a request from an attorney, who handles claims for the district under the District's Insurance Agent, regarding a conflict of interest of them representing the district and the county in a lawsuit. Mr. Haber advised the board he reviewed the waiver and is comfortable with the board agreeing to it.

On a motion by Mr. Taylor, seconded by Mr. Och, with all in favor, the Board approved the district to execute the Waiver of Conflict, for the Heritage Landing Community Development District.

141

142

B. Amenity Center and Field Maintenance

143

144

145

1.) Amenity Manager Report

146

147

i.) Review Credit Card Options

148

149

The board tabled this discussion until the June meeting.

150

151

ii.) Update on Drone Policy

152

153

154

Mr. Haber confirmed he was comfortable with the policy. The board directed it to be added to the policies.

155

156

2.) Field Manager Report

157

158

3.) Charles Aquatics Report

159

160

C. District Manager

161

162

1.) Presentation of Registered Voter County

163

164

165

166

167

168

169

TWELFTH ORDER OF BUSINESS

**SUPERVISOR REQUESTS &
AUDIENCE COMMENTS**

Supervisor Request:

Mr. Och suggested that the board review additional signage for the amenities at a future meeting.

Audience Comments:

There were no audience comments.

THIRTEENTH ORDER OF BUSINESS

ADJOURNMENT

On a motion by Mr. Och, and seconded by Mr. Austin, with all in favor, the Board adjourned the meeting at 8:06 p.m., for the Heritage Landing Community Development District.

170
171
172
173
174
175
176
177
178
179
180
181
182
183

184
185
186
187
188
189
190
191
192
193
194
195
196
197
198
199
200
201
202
203
204
205
206
207
208
209
210
211
212
213
214
215
216

217
218
219
220
221
222
223
224
225
226
227
228
229
230
231
232
233
234
235
236
237
238
239
240
241
242
243
244
245
246
247
248
249
250
251

Secretary /Assistant Secretary

Chairman / Vice Chairman

DRAFT

HERITAGE LANDING COMMUNITY DEVELOPMENT DISTRICT

DISTRICT OFFICE · ST. AUGUSTINE, FLORIDA 32084

MAILING ADDRESS · 3434 COLWELL AVENUE, SUITE 200 · TAMPA, FLORIDA 33614

WWW.HERITAGELANDINGCDD.ORG

Operation and Maintenance Expenditures

April 2025

Presented For Board Approval

Attached please find the check register listing the Operation and Maintenance expenditures paid from April 1, 2025 through April 30, 2025. This does not include expenditures previously approved by the Board.

The total items being presented: **\$144,980.70**

Approval of Expenditures:

_____ Chairperson

_____ Vice Chairperson

_____ Assistant Secretary

Heritage Landing Community Development District

Paid Operation & Maintenance Expenditures

April 1, 2025 Through April 30, 2025

<u>Vendor Name</u>	<u>Check Number</u>	<u>Invoice Number</u>	<u>Invoice Description</u>	<u>Invoice Amount</u>
AquaShield Products LLC	300084	224071	Finishing Wax - Waterslide Maintenance 03/25	\$ 322.13
Berger, Toombs, Elam, Gaines & Frank CPA	300077	370745	Audit Services FY 23/24	\$ 3,215.00
Big Z Pools, LLC	300071	6990-I	Family Pool Plaster Repair 03/25	\$ 1,547.00
Big Z Pools, LLC	300071	6990-J	Lap Pool Gutter Repair 03/25	\$ 568.00
BrightView Landscape Services, Inc.	300072	9098742-2	Mainline Repair End of River Lagoon in Shrubs 09/24	\$ 150.00
BrightView Landscape Services, Inc.	300085	9291095	Open Oak Tree Canopy - Clubhouse Entrance Way 03/25	\$ 3,285.89
BrightView Landscape Services, Inc.	300085	9303715	Landscape Maintenance 04/25	\$ 22,067.00
BrightView Landscape Services, Inc.	300085	9308281	Dead Tree Removals 03/25	\$ 3,000.00
Charles Aquatics, Inc.	300086	52997	Pond Maintenance 04/25	\$ 975.00
Christine Mallatt	20250429-3	CM042325 ACH	Board of Supervisors Meeting - Workshop 04/23/25	\$ 200.00
COMCAST	20250404-1	8495 74 140 0429787 03/25 ACH	Internet Services 03/25	\$ 319.41

Heritage Landing Community Development District

Paid Operation & Maintenance Expenditures

April 1, 2025 Through April 30, 2025

Vendor Name	Check Number	Invoice Number	Invoice Description	Invoice Amount
Florida Department of Revenue	20240424-1	65-8015563124-2	65-8015563124-2 Sales & Use Tax 03/25	\$ 146.05
Florida Power & Light Company	20250408-1	03/25 ACH 87098-35048 03/25	Electric Services 03/25	\$ 4,510.09
Florida Power & Light Company	20250415-3	ACH Monthly Summary 03/25 ACH 475	Electric Services 03/25	\$ 5,101.03
Gannett Florida LocaliQ	300078	0006986337	Account# 968025 Legal Advertising 02/25	\$ 334.48
Gannett Florida LocaliQ	300074	0007038068	Account# 968025 Legal Advertising 03/25	\$ 163.12
Kevin Lee Austin	20250415-1	KA041025 ACH	Board of Supervisors Meeting 04/10/25	\$ 200.00
Kevin Lee Austin	20250429-2	KA042325 ACH	Board of Supervisors Meeting - Workshop 04/23/25	\$ 200.00
Leslie Achara McNair-Tarfa	300079	AT041025	Board of Supervisors Meeting 04/10/25	\$ 200.00
Leslie Achara McNair-Tarfa	300088	AT042325	Board of Supervisors Meeting - Workshop 04/23/25	\$ 200.00
Michael C. Taylor	20250415-2	MT041025 ACH	Board of Supervisors Meeting 04/10/25	\$ 200.00
Michael C. Taylor	20250429-1	MT042325 ACH	Board of Supervisors Meeting - Workshop 04/23/25	\$ 200.00
Northeast Quality Services LLC	300087	37816	Janitorial Services 04/25	\$ 900.00

Heritage Landing Community Development District

Paid Operation & Maintenance Expenditures

April 1, 2025 Through April 30, 2025

<u>Vendor Name</u>	<u>Check Number</u>	<u>Invoice Number</u>	<u>Invoice Description</u>	<u>Invoice Amount</u>
Progressive Entertainment, Inc.	300080	129557789 Balance	DJ and Laser Tag 04/25	\$ 1,251.50
Rizzetta & Company, Inc.	300073	INV0000098276	District Management Fees 04/25	\$ 5,983.33
Robert Och	300081	RO041025	Board of Supervisors Meeting 04/10/25	\$ 200.00
Robert Och	300089	RO042325	Board of Supervisors Meeting - Workshop 04/23/25	\$ 200.00
St Johns Utility Department	20250418-1	503699-115198 03/25 ACH	Water Services 03/25	\$ 892.99
St Johns Utility Department	20250418-2	533275-126033 03/25 ACH	Water Services 03/25	\$ 34.42
Stuck On You Body Art	300082	041925A Balance	Artists for Spring Fling 04/25	\$ 337.00
Vesta Property Services, Inc.	300083	425208	Management Services 02/25	\$ 36,118.90
Vesta Property Services, Inc.	300083	425784	Management Services 03/25	\$ 51,033.36
VGlobal Tech	300075	7181	ADA Website Maintenance 04/25	\$ 175.00
Wayne Automatic Fire Sprinklers, Inc.	300076	1205713	Annual Fees - Sprinkler, Backflow, Domestic Backflow & Alarm 03/25	<u>\$ 750.00</u>
Report Total				<u>\$ 144,980.70</u>

Tab 2



Quality Site Assessment

Prepared for: **Heritage Landing @ WGV**

General Information

- DATE:** Monday, Jun 02, 2025
- NEXT QSA DATE:** Friday, Aug 29, 2025
- CLIENT ATTENDEES:** Lourens Erasmus
- BRIGHTVIEW ATTENDEES:** Steve McAvoy

Customer Focus Areas

Turf health, Annuals, Weed control, Plant Health, Athletic Field

Quality you can count on.

<h1>7</h1> <p>Seven Standards of Excellence</p>	 <p>1 Site Cleanliness</p>	 <p>2 Weed Free</p>	 <p>3 Green Turf</p>
	 <p>4 Crisp Edges</p>	 <p>5 Spectacular Flowers</p>	 <p>6 Uniformly Mulched Beds</p>

Carryover Items



1 There is some dead in schillings inside of pool area that need to be pruned out to allow new growth to push out. We will address this with our team

2 We continue to work on hand pulling vines throughout the site weekly. This will continue to be an issue in certain areas, but we are making good progress weekly

QUALITY SITE ASSESSMENT

Heritage Landing @ WGV

Maintenance Items



1 There are some crêpe myrtle suckers growing up in beds by court areas. These have since been removed.

2 Ornamental grass beds need to be shaved back away from sidewalk areas. We will get with our team and have this completed during their next visit.

3 Patio Ligustrum's by court areas have been trimmed and look great

4 There are some vines and weeds growing in bed across from Bridge area. We will get with our team to have these removed during their next visit.

Maintenance Items



5 Some of the oak trees located outside of amenities entrance along Heritage Landing Parkway need to be elevated. We will get with our team and have this scheduled and follow up once completed.

6 There is a low hanging limb just before bridge that needs to be removed. We will get with our team and have this addressed during their next visit.

7 Playground area is clean and weed free

8 There are a few volunteers growing up near theater area. We will get with our team to have these removed during their next visit.

QUALITY SITE ASSESSMENT

Heritage Landing @ WGV

Maintenance Items

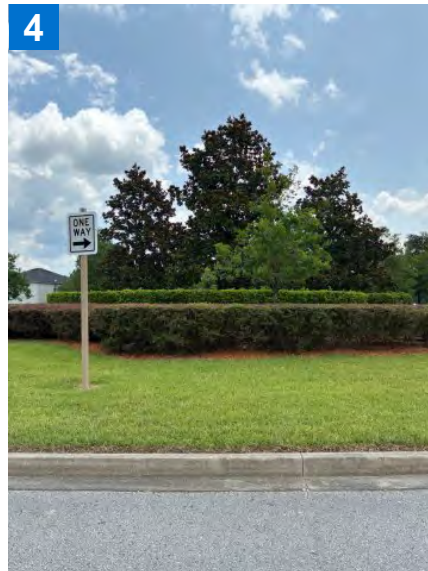


9 Trimming is being completed on a weekly rotation

10 pool deck area is clean and weed free

11 Next flower change out is scheduled for June 17. We will get with our team and set pulled flowers at the southside of Fpl area. We will follow up with a date when flowers will be removed so the community can have access to them. We have had very good success where command soil was installed at clubhouse and the 2 beds at clubhouse entry on Heritage Landing Pkwy. We will be trying same approach with the bed on north side of roundabout as well before next change out as this bed has struggled in the past as well.

Recommendations for Property Enhancements



1 We will be submitting a proposal to remove Jasmine and install St Augustine sod at Island tip outside of amenities entrance

2 We will be submitting a proposal to install turf at declining area along swallowtail by bus stop/bridge area

3 We recommend closing in this mulch area with new sod across from roundabout. We can also propose a small color bed at the corners upon request

4 We will be submitting a proposal to remove loropetalums and azaleas around center roundabout area, enclosing bed with sod and transplanting some of the shrubs at another location by school bus stop.

Recommendations for Property Enhancements



5 Accident area before roundabout we recommend removing all shrubs and installing sod for a better line of site and a clearer look

6 We will be working on revising renderings for bus stop area next to roundabout and then follow up with a quote once we have an agreed plan in place

QUALITY SITE ASSESSMENT

Heritage Landing @ WGV

Notes to Owner / Client



- 1** Cohan grass areas have been retreated the the fpl area, we will be retreated areas along the front pond this week.
- 2** Silver Glen area - as promised we went a head and replaced declining turf areas with St Augustine sod. We also went ahead and removed several yards of fill to lower the grade of area as it was 6 to 8 inches high in some areas, lowering the grade gives a much more appealing look.

QUALITY SITE ASSESSMENT

Heritage Landing @ WGV

Completed Items



- 1** We are continuing to treat ant mounds as needed. We found a few active mounds this week while on site and treated.
- 2** Crepe Myrtle trees that were cut back at front entrance over the winter have responded nicely and are looking healthy
- 3** Paver areas are clean in weed free inside pool area
- 4** There are a few palm volunteers growing in common area north of clubhouse. We will get with our team and have this addressed during their next visit.

Before



After



Before



After



Before



After



After



Before



After



Before



Before



Before



After



Before



After



Before



After



Proposal for Extra Work at Heritage Landing @ WGV

Property Name	Heritage Landing @ WGV	Contact	Lourens Erasmus
Property Address	370 Heritage Landing Pkwy St Augustine , FL 32092	To Billing Address	Heritage Landing CDD c/o Rizzetta and Company Inc 370 Heritage Landing Pkwy St Augustine, FL 32092
Project Name	Heritage Landing - Sod Proposals Area 1 & 2		
Project Description	enhancement		

Scope of Work

QTY	UoM/Size	Material/Description	Unit Price	Total
Streamboat- bus stop area by bridge (Area 1)			Subtotal	\$1,049.51
1.00	LUMP SUM	Labor to remove turf with sod cutter, till up area, and rough grade to prep for sod install. This also includes debris removal and disposal.		
450.00	SQUARE FEET	St Augustine sod installed		
1.00	LUMP SUM	Sod Delivery Fee		
1.00	LUMP SUM	Irrigation check to ensure proper coverage		
Heritage Landing Pkwy- Jasmine bed (Area 2)			Subtotal	\$4,222.67
1.00	LUMP SUM	Labor to remove jasmine, remove soil to lower grade, till up area to loosen soil, and rough grade to prep for sod install. This also includes debris removal and disposal.		
1,350.00	SQUARE FEET	St Augustine sod installed		
1.00	LUMP SUM	Sod Delivery Fee		
1.00	LUMP SUM	Heavy equip/ Skid steer fee		
1.00	LUMP SUM	Irrigation check to ensure proper coverage		

For internal use only

SO# 8685122
JOB# 460802023
Service Line 130

Total Price \$5,272.18

THIS IS NOT AN INVOICE

This proposal is valid for thirty (30) days unless otherwise approved by Contractor's Senior Vice President
5811 County Rd 305, Elkton, FL 32033 ph. fax

TERMS & CONDITIONS

- 1. The Contractor shall recognize and perform in accordance with written terms, written specifications and drawings only contained or referred to herein. All materials shall conform to bid specifications.
- 2. **Work Force:** Contractor shall designate a qualified representative with experience in landscape maintenance/construction upgrades or when applicable in tree management. The workforce shall be competent and qualified, and shall be legally authorized to work in the U.S.
- 3. **License and Permits:** Contractor shall maintain a Landscape Contractor's license, if required by State or local law, and will comply with all other license requirements of the City, State and Federal Governments, as well as all other requirements of law. Unless otherwise agreed upon by the parties or prohibited by law, Customer shall be required to obtain all necessary and required permits to allow the commencement of the Services on the property.
- 4. **Taxes:** Contractor agrees to pay all applicable taxes, including sales or General Excise Tax (GET), where applicable.
- 5. **Insurance:** Contractor agrees to provide General Liability Insurance, Automotive Liability Insurance, Worker's Compensation Insurance, and any other insurance required by law or Customer, as specified in writing prior to commencement of work. If not specified, Contractor will furnish insurance with \$1,000,000 limit of liability.
- 6. **Liability:** Contractor shall not be liable for any damage that occurs from Acts of God defined as extreme weather conditions, fire, earthquake, etc. and rules, regulations or restrictions imposed by any government or governmental agency, national or regional emergency, epidemic, pandemic, health related outbreak or other medical events not caused by one or other delays or failure of performance beyond the commercially reasonable control of either party. Under these circumstances, Contractor shall have the right to renegotiate the terms and prices of this Contract within sixty (60) days.
- 7. Any illegal trespass, claims and/or damages resulting from work requested that is not on property owned by Customer or not under Customer management and control shall be the sole responsibility of the Customer.
- 8. **Subcontractors:** Contractor reserves the right to hire qualified subcontractors to perform specialized functions or work requiring specialized equipment.
- 9. **Additional Services:** Any additional work not shown in the above specifications involving extra costs will be executed only upon signed written orders, and will become an extra charge over and above the estimate.
- 10. **Access to Jobsite:** Customer shall provide all utilities to perform the work. Customer shall furnish access to all parts of jobsite where Contractor is to perform work as required by the Contract or other functions related thereto, during normal business hours and other reasonable periods of time. Contractor will perform the work as reasonably practical after the Customer makes the site available for performance of the work.
- 11. **Payment Terms:** Upon signing this Agreement, Customer shall pay Contractor 50% of the Proposed Price and the remaining balance shall be paid by Customer to Contractor upon completion of the project unless otherwise, agreed to in writing.
- 12. **Termination:** This Work Order may be terminated by the either party with or without cause, upon seven (7) workdays advance written notice. Customer will be required to pay for all materials purchased and work complete to the date of termination and reasonable charges incurred in demobilizing.
- 13. **Assignment:** The Customer and the Contractor respectively, bind themselves, their partners, successors, assignees and legal representative to the other party with respect to all covenants of this Agreement. Neither the Customer nor the Contractor shall assign or transfer any interest in this Agreement without the written consent of the other provided, however, that consent shall not be required to assign this Agreement to any company which controls, is controlled by, or is under common control with Contractor or in connection with assignment to an affiliate or pursuant to a merger, sale of all or substantially all of its assets or equity securities, consolidation, change of control or corporate reorganization.
- 14. **Disclaimer:** This proposal was estimated and priced based upon a site visit and visual inspection from ground level using ordinary means, at or about the time this proposal was prepared. The price quoted in this proposal for the work described, is the result of that ground level visual inspection and therefore our company will not be liable for any additional costs or damages for additional work not described herein, or liable for any incidents/accidents resulting from conditions, that were not ascertainable by said ground level visual inspection by ordinary means at the time said inspection was performed. Contractor cannot be held responsible for unknown or otherwise hidden defects. Any corrective work proposed herein cannot guarantee exact results. Professional engineering, architectural, and/or landscape design services ("Design Services") are not included in this Agreement and shall not be provided by the Contractor. Any design defects in the Contract Documents are the sole responsibility of the Customer. If the Customer must engage a licensed engineer, architect and/or landscape design professional, any costs concerning these Design Services are to be paid by the Customer directly to the designer involved.

- 15. **Cancellation:** Notice of Cancellation of work must be received in writing before the crew is dispatched to their location or Customer will be liable for a minimum travel charge of \$150.00 and billed to Customer.

The following sections shall apply where Contractor provides Customer with tree care services:

- 16. **Tree & Stump Removal:** Trees removed will be cut as close to the ground as possible based on conditions to or next to the bottom of the tree trunk. Additional charges will be levied for unseen hazards such as, but not limited to concrete brick filled trunks, metal rods, etc. If requested mechanical grinding of visible tree stump will be done to a defined width and depth below ground level at an additional charge to the Customer. Defined backfill and landscape material may be specified. Customer shall be responsible for contacting the appropriate underground utility locator company to locate and mark underground utility lines prior to start of work. Contractor is not responsible damage done to underground utilities such as but not limited to, cables, wires, pipes, and irrigation parts. Contractor will repair damaged irrigation lines at the Customer's expense.
- 17. **Waiver of Liability:** Requests for crown thinning in excess of twenty-five percent (25%) or work not in accordance with ISA (International Society of Arboricultural) standards will require a signed waiver of liability.

Acceptance of this Contract

By executing this document, Customer agrees to the formation of a binding contract and to the terms and conditions set forth herein. Customer represents that Contractor is authorized to perform the work stated on the face of this Contract. If payment has not been received by Contractor per payment terms hereunder, Contractor shall be entitled to all costs of collection, including reasonable attorneys' fees and it shall be relieved of any obligation to continue performance under this or any other Contract with Customer. Interest at a per annum rate of 1.5% per month (18% per year), or the highest rate permitted by law, may be charged on unpaid balance 15 days after billing.

NOTICE: FAILURE TO MAKE PAYMENT WHEN DUE FOR COMPLETED WORK ON CONSTRUCTION JOBS, MAY RESULT IN A MECHANIC'S LIEN ON THE TITLE TO YOUR PROPERTY

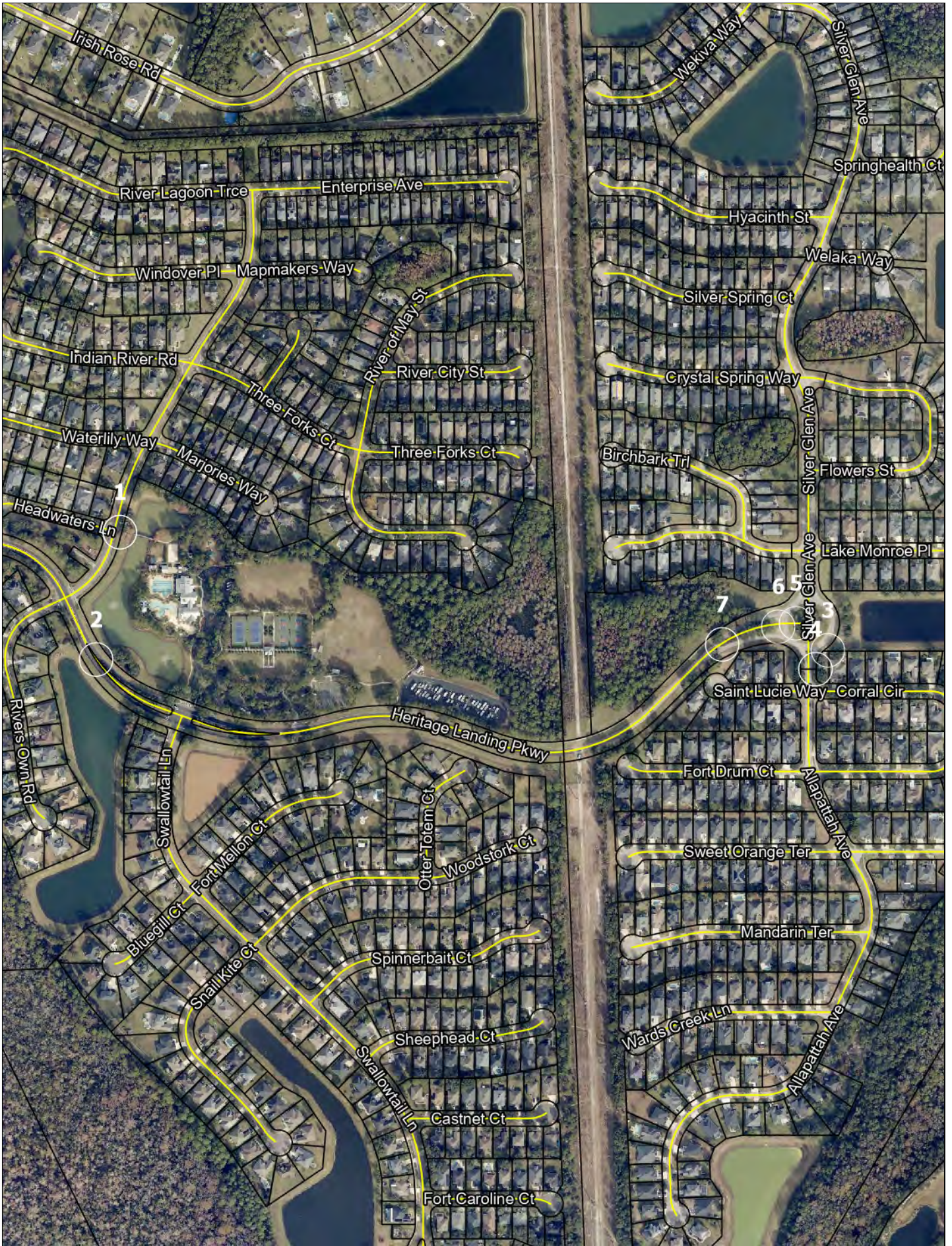
Customer

Signature	Title	Property Manager
Lourens Erasmus	Date	June 05, 2025
Printed Name		

BrightView Landscape Services, Inc. "Contractor"

Signature	Title	Account Manager
Steven C. McAvoy Jr.	Date	June 05, 2025
Printed Name		

Job #:	460802023		
SO #:	8685122	Proposed Price:	\$5,272.18



Proposal for Extra Work at Heritage Landing @ WGV

Property Name	Heritage Landing @ WGV	Contact	Lourens Erasmus
Property Address	370 Heritage Landing Pkwy St Augustine , FL 32092	To Billing Address	Heritage Landing CDD c/o Rizzetta and Company Inc 370 Heritage Landing Pkwy St Augustine, FL 32092
Project Name	Heritage Landing - Sod Proposals on Heritage landing Area 6 & 7		
Project Description	enhancement		

Scope of Work

QTY	UoM/Size	Material/Description	Total
West area across from roundabout (Area 6)			\$2,799.62
1.00	LUMP SUM	Labor to remove mulch, till up area, and rough grade to prep for sod install. This also includes debris removal and disposal.	
1,350.00	SQUARE FEET	St Augustine sod installed	
1.00	LUMP SUM	Sod delivery fee	
1.00	LUMP SUM	Irrigation check to ensure proper coverage	
Heritage Landing Pkwy- Accident Area (Area 7)			\$5,384.67
1.00	LUMP SUM	Labor to remove all plant material, remove soil to lower grade, till up area to loosen soil, and rough grade to prep for sod install. This also includes debris removal and disposal.	
1,800.00	SQUARE FEET	St Augustine sod installed	
1.00	LUMP SUM	Sod delivery fee	
1.00	LUMP SUM	Heavy equip / Skid steer fee	
1.00	LUMP SUM	Irrigation check to ensure proper coverage	

For internal use only

SO# 8685286
JOB# 460802023
Service Line 130

Total Price \$8,184.29

THIS IS NOT AN INVOICE

This proposal is valid for thirty (30) days unless otherwise approved by Contractor's Senior Vice President
5811 County Rd 305, Elkton, FL 32033 ph. fax

TERMS & CONDITIONS

- 1. The Contractor shall recognize and perform in accordance with written terms, written specifications and drawings only contained or referred to herein. All materials shall conform to bid specifications.
- 2. **Work Force:** Contractor shall designate a qualified representative with experience in landscape maintenance/construction upgrades or when applicable in tree management. The workforce shall be competent and qualified, and shall be legally authorized to work in the U.S.
- 3. **License and Permits:** Contractor shall maintain a Landscape Contractor's license, if required by State or local law, and will comply with all other license requirements of the City, State and Federal Governments, as well as all other requirements of law. Unless otherwise agreed upon by the parties or prohibited by law, Customer shall be required to obtain all necessary and required permits to allow the commencement of the Services on the property.
- 4. **Taxes:** Contractor agrees to pay all applicable taxes, including sales or General Excise Tax (GET), where applicable.
- 5. **Insurance:** Contractor agrees to provide General Liability Insurance, Automotive Liability Insurance, Worker's Compensation Insurance, and any other insurance required by law or Customer, as specified in writing prior to commencement of work. If not specified, Contractor will furnish insurance with \$1,000,000 limit of liability.
- 6. **Liability:** Contractor shall not be liable for any damage that occurs from Acts of God defined as extreme weather conditions, fire, earthquake, etc. and rules, regulations or restrictions imposed by any government or governmental agency, national or regional emergency, epidemic, pandemic, health related outbreak or other medical events not caused by one or other delays or failure of performance beyond the commercially reasonable control of either party. Under these circumstances, Contractor shall have the right to renegotiate the terms and prices of this Contract within sixty (60) days.
- 7. Any illegal trespass, claims and/or damages resulting from work requested that is not on property owned by Customer or not under Customer management and control shall be the sole responsibility of the Customer.
- 8. **Subcontractors:** Contractor reserves the right to hire qualified subcontractors to perform specialized functions or work requiring specialized equipment.
- 9. **Additional Services:** Any additional work not shown in the above specifications involving extra costs will be executed only upon signed written orders, and will become an extra charge over and above the estimate.
- 10. **Access to Jobsite:** Customer shall provide all utilities to perform the work. Customer shall furnish access to all parts of jobsite where Contractor is to perform work as required by the Contract or other functions related thereto, during normal business hours and other reasonable periods of time. Contractor will perform the work as reasonably practical after the Customer makes the site available for performance of the work.
- 11. **Payment Terms:** Upon signing this Agreement, Customer shall pay Contractor 50% of the Proposed Price and the remaining balance shall be paid by Customer to Contractor upon completion of the project unless otherwise, agreed to in writing.
- 12. **Termination:** This Work Order may be terminated by the either party with or without cause, upon seven (7) workdays advance written notice. Customer will be required to pay for all materials purchased and work complete to the date of termination and reasonable charges incurred in demobilizing.
- 13. **Assignment:** The Customer and the Contractor respectively, bind themselves, their partners, successors, assignees and legal representative to the other party with respect to all covenants of this Agreement. Neither the Customer nor the Contractor shall assign or transfer any interest in this Agreement without the written consent of the other provided, however, that consent shall not be required to assign this Agreement to any company which controls, is controlled by, or is under common control with Contractor or in connection with assignment to an affiliate or pursuant to a merger, sale of all or substantially all of its assets or equity securities, consolidation, change of control or corporate reorganization.
- 14. **Disclaimer:** This proposal was estimated and priced based upon a site visit and visual inspection from ground level using ordinary means, at or about the time this proposal was prepared. The price quoted in this proposal for the work described, is the result of that ground level visual inspection and therefore our company will not be liable for any additional costs or damages for additional work not described herein, or liable for any incidents/accidents resulting from conditions, that were not ascertainable by said ground level visual inspection by ordinary means at the time said inspection was performed. Contractor cannot be held responsible for unknown or otherwise hidden defects. Any corrective work proposed herein cannot guarantee exact results. Professional engineering, architectural, and/or landscape design services ("Design Services") are not included in this Agreement and shall not be provided by the Contractor. Any design defects in the Contract Documents are the sole responsibility of the Customer. If the Customer must engage a licensed engineer, architect and/or landscape design professional, any costs concerning these Design Services are to be paid by the Customer directly to the designer involved.

- 15. **Cancellation:** Notice of Cancellation of work must be received in writing before the crew is dispatched to their location or Customer will be liable for a minimum travel charge of \$150.00 and billed to Customer.

The following sections shall apply where Contractor provides Customer with tree care services:

- 16. **Tree & Stump Removal:** Trees removed will be cut as close to the ground as possible based on conditions to or next to the bottom of the tree trunk. Additional charges will be levied for unseen hazards such as, but not limited to concrete brick filled trunks, metal rods, etc. If requested mechanical grinding of visible tree stump will be done to a defined width and depth below ground level at an additional charge to the Customer. Defined backfill and landscape material may be specified. Customer shall be responsible for contacting the appropriate underground utility locator company to locate and mark underground utility lines prior to start of work. Contractor is not responsible damage done to underground utilities such as but not limited to, cables, wires, pipes, and irrigation parts. Contractor will repair damaged irrigation lines at the Customer's expense.
- 17. **Waiver of Liability:** Requests for crown thinning in excess of twenty-five percent (25%) or work not in accordance with ISA (International Society of Arboricultural) standards will require a signed waiver of liability.

Acceptance of this Contract

By executing this document, Customer agrees to the formation of a binding contract and to the terms and conditions set forth herein. Customer represents that Contractor is authorized to perform the work stated on the face of this Contract. If payment has not been received by Contractor per payment terms hereunder, Contractor shall be entitled to all costs of collection, including reasonable attorneys' fees and it shall be relieved of any obligation to continue performance under this or any other Contract with Customer. Interest at a per annum rate of 1.5% per month (18% per year), or the highest rate permitted by law, may be charged on unpaid balance 15 days after billing.

NOTICE: FAILURE TO MAKE PAYMENT WHEN DUE FOR COMPLETED WORK ON CONSTRUCTION JOBS, MAY RESULT IN A MECHANIC'S LIEN ON THE TITLE TO YOUR PROPERTY

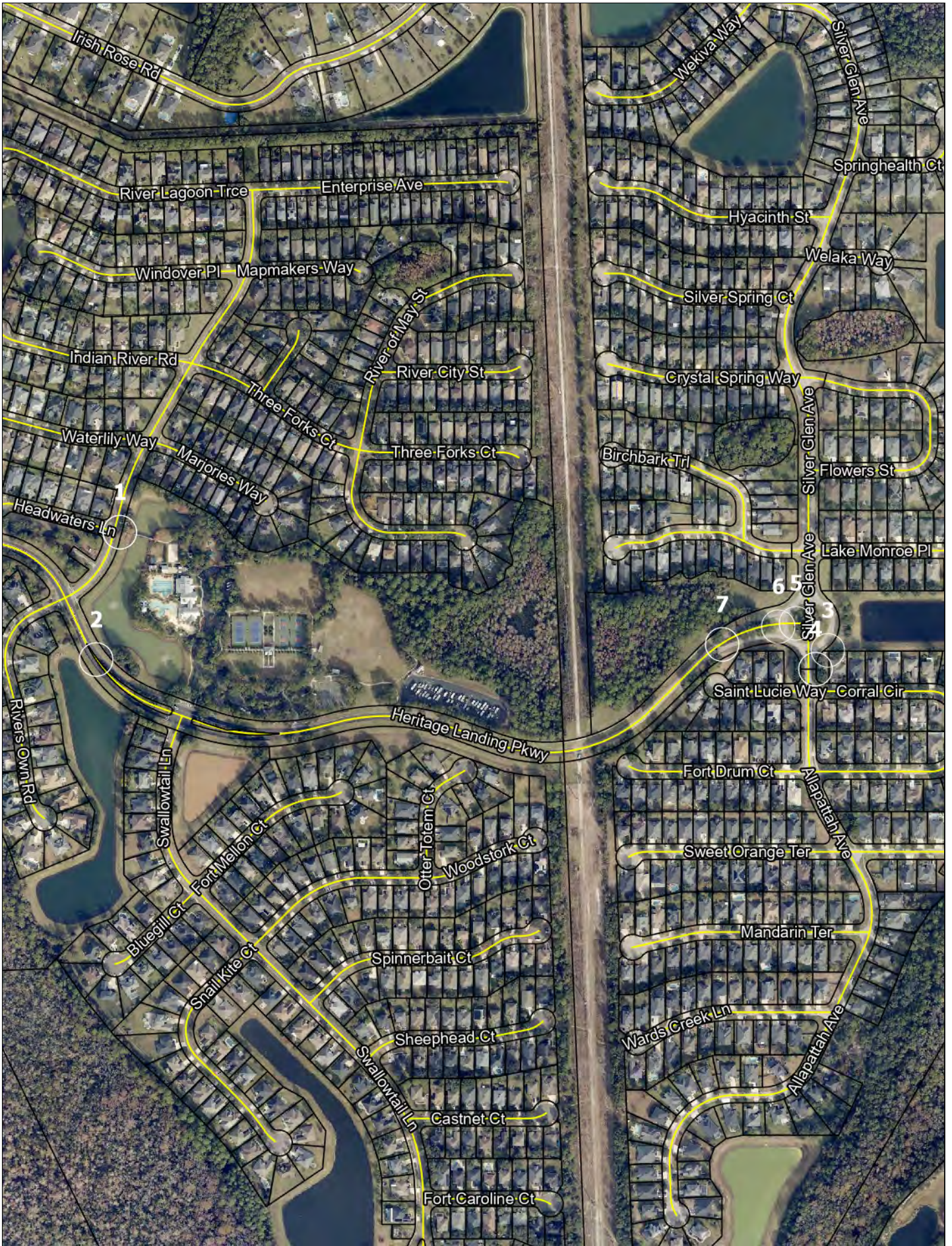
Customer

Signature	Title	Property Manager
Lourens Erasmus	Date	June 05, 2025
Printed Name		

BrightView Landscape Services, Inc. "Contractor"

Signature	Title	Account Manager
Steven C. McAvoy Jr.	Date	June 05, 2025
Printed Name		

Job #:	460802023		
SO #:	8685286	Proposed Price:	\$8,184.29



Proposal for Extra Work at Heritage Landing @ WGV

Property Name	Heritage Landing @ WGV	Contact	Lourens Erasmus
Property Address	370 Heritage Landing Pkwy c/o Rizzetta and Company Inc 370 Heritage Landing Pkwy St Augustine, FL 32092	To Billing Address	Heritage Landing CDD c/o Rizzetta and Company Inc 370 Heritage Landing Pkwy St Augustine, FL 32092

Project Name Heritage Landing Pkwy - Roundabout enhancement

Project Description enhancement

Scope of Work

This quote is to remove all Loropetalum and Azaleas located at the outside perimeter of Viburnum hedge and install St Augustine sod to open up a cleaner line of site.

QTY	UoM/Size	Material/Description	Unit Price	Total
Roundabout area			Subtotal	\$15,306.99
1.00	LUMP SUM	Mobilization and labor to remove plant material, rough grade areas, deep edge bed lines, and remove debris from site.	\$7,128.00	\$7,128.00
1.00	LUMP SUM	Transplant Loropetalum in front wax myrtle behind bike rake	\$923.40	\$923.40
4,500.00	SQUARE FEET	St Augustine sod installed	\$1.25	\$5,640.30
1.00	LUMP SUM	Sod delivery fee	\$829.29	\$829.29
2.50	LUMP SUM	Disposal fee	\$194.40	\$486.00
1.00	LUMP SUM	Heavy equip/ Skid steer fee	\$300.00	\$300.00
irrigation			Subtotal	\$1,009.80
1.00	LUMP SUM	Irrigation modifications and adjustments	\$1,009.80	\$1,009.80

THIS IS NOT AN INVOICE

This proposal is valid for thirty (30) days unless otherwise approved by Contractor's Senior Vice President
5811 County Rd 305, Elkton, FL 32033 ph. fax

Proposal for Extra Work at Heritage Landing @ WGV

Images

heritage round a bout



For internal use only

SO# 8679984
JOB# 460802023
Service Line 130

Total Price \$16,316.79

THIS IS NOT AN INVOICE

This proposal is valid for thirty (30) days unless otherwise approved by Contractor's Senior Vice President
5811 County Rd 305, Elkton, FL 32033 ph. fax

TERMS & CONDITIONS

1. The Contractor shall recognize and perform in accordance with written terms, written specifications and drawings only contained or referred to herein. All materials shall conform to bid specifications.
2. **Work Force:** Contractor shall designate a qualified representative with experience in landscape maintenance/construction upgrades or when applicable in tree management. The workforce shall be competent and qualified, and shall be legally authorized to work in the U.S.
3. **License and Permits:** Contractor shall maintain a Landscape Contractor's license, if required by State or local law, and will comply with all other license requirements of the City, State and Federal Governments, as well as all other requirements of law. Unless otherwise agreed upon by the parties or prohibited by law, Customer shall be required to obtain all necessary and required permits to allow the commencement of the Services on the property.
4. **Taxes:** Contractor agrees to pay all applicable taxes, including sales or General Excise Tax (GET), where applicable.
5. **Insurance:** Contractor agrees to provide General Liability Insurance, Automotive Liability Insurance, Worker's Compensation Insurance, and any other insurance required by law or Customer, as specified in writing prior to commencement of work. If not specified, Contractor will furnish insurance with \$1,000,000 limit of liability.
6. **Liability:** Contractor shall not be liable for any damage that occurs from Acts of God defined as extreme weather conditions, fire, earthquake, etc. and rules, regulations or restrictions imposed by any government or governmental agency, national or regional emergency, epidemic, pandemic, health related outbreak or other medical events not caused by one or other delays or failure of performance beyond the commercially reasonable control of either party. Under these circumstances, Contractor shall have the right to renegotiate the terms and prices of this Contract within sixty (60) days.
7. Any illegal trespass, claims and/or damages resulting from work requested that is not on property owned by Customer or not under Customer management and control shall be the sole responsibility of the Customer.
8. **Subcontractors:** Contractor reserves the right to hire qualified subcontractors to perform specialized functions or work requiring specialized equipment.
9. **Additional Services:** Any additional work not shown in the above specifications involving extra costs will be executed only upon signed written orders, and will become an extra charge over and above the estimate.
10. **Access to Jobsite:** Customer shall provide all utilities to perform the work. Customer shall furnish access to all parts of jobsite where Contractor is to perform work as required by the Contract or other functions related thereto, during normal business hours and other reasonable periods of time. Contractor will perform the work as reasonably practical after the Customer makes the site available for performance of the work.
11. **Payment Terms:** Upon signing this Agreement, Customer shall pay Contractor 50% of the Proposed Price and the remaining balance shall be paid by Customer to Contractor upon completion of the project unless otherwise, agreed to in writing.
12. **Termination:** This Work Order may be terminated by the either party with or without cause, upon seven (7) workdays advance written notice. Customer will be required to pay for all materials purchased and work complete to the date of termination and reasonable charges incurred in demobilizing.
13. **Assignment:** The Customer and the Contractor respectively, bind themselves, their partners, successors, assignees and legal representative to the other party with respect to all covenants of this Agreement. Neither the Customer nor the Contractor shall assign or transfer any interest in this Agreement without the written consent of the other provided, however, that consent shall not be required to assign this Agreement to any company which controls, is controlled by, or is under common control with Contractor or in connection with assignment to an affiliate or pursuant to a merger, sale of all or substantially all of its assets or equity securities, consolidation, change of control or corporate reorganization.
14. **Disclaimer:** This proposal was estimated and priced based upon a site visit and visual inspection from ground level using ordinary means, at or about the time this proposal was prepared. The price quoted in this proposal for the work described, is the result of that ground level visual inspection and therefore our company will not be liable for any additional costs or damages for additional work not described herein, or liable for any incidents/accidents resulting from conditions, that were not ascertainable by said ground level visual inspection by ordinary means at the time said inspection was performed. Contractor cannot be held responsible for unknown or otherwise hidden defects. Any corrective work proposed herein cannot guarantee exact results. Professional engineering, architectural, and/or landscape design services ("Design Services") are not included in this Agreement and shall not be provided by the Contractor. Any design defects in the Contract Documents are the sole responsibility of the Customer. If the Customer must engage a licensed engineer, architect and/or landscape design professional, any costs concerning these Design Services are to be paid by the Customer directly to the designer involved.

15. **Cancellation:** Notice of Cancellation of work must be received in writing before the crew is dispatched to their location or Customer will be liable for a minimum travel charge of \$150.00 and billed to Customer.

The following sections shall apply where Contractor provides Customer with tree care services:

16. **Tree & Stump Removal:** Trees removed will be cut as close to the ground as possible based on conditions to or next to the bottom of the tree trunk. Additional charges will be levied for unseen hazards such as, but not limited to concrete brick filled trunks, metal rods, etc. If requested mechanical grinding of visible tree stump will be done to a defined width and depth below ground level at an additional charge to the Customer. Defined backfill and landscape material may be specified. Customer shall be responsible for contacting the appropriate underground utility locator company to locate and mark underground utility lines prior to start of work. Contractor is not responsible damage done to underground utilities such as but not limited to, cables, wires, pipes, and irrigation parts. Contractor will repair damaged irrigation lines at the Customer's expense.
17. **Waiver of Liability:** Requests for crown thinning in excess of twenty-five percent (25%) or work not in accordance with ISA (International Society of Arboricultural) standards will require a signed waiver of liability.

Acceptance of this Contract

By executing this document, Customer agrees to the formation of a binding contract and to the terms and conditions set forth herein. Customer represents that Contractor is authorized to perform the work stated on the face of this Contract. If payment has not been received by Contractor per payment terms hereunder, Contractor shall be entitled to all costs of collection, including reasonable attorneys' fees and it shall be relieved of any obligation to continue performance under this or any other Contract with Customer. Interest at a per annum rate of 1.5% per month (18% per year), or the highest rate permitted by law, may be charged on unpaid balance 15 days after billing.

NOTICE: FAILURE TO MAKE PAYMENT WHEN DUE FOR COMPLETED WORK ON CONSTRUCTION JOBS, MAY RESULT IN A MECHANIC'S LIEN ON THE TITLE TO YOUR PROPERTY

Customer

Signature	Title	Property Manager
Lourens Erasmus	Date	June 05, 2025
Printed Name		

BrightView Landscape Services, Inc. "Contractor"

Signature	Title	Account Manager
Steven C. McAvoy Jr.	Date	June 05, 2025
Printed Name		

Job #:	460802023		
SO #:	8679984	Proposed Price:	\$16,316.79



Proposal for Extra Work at Heritage Landing @ WGV

Property Name	Heritage Landing @ WGV	Contact	Lourens Erasmus
Property Address	232 Silver Glen Ave Saint Augustine, FL 32092	To Billing Address	Heritage Landing CDD c/o Rizzetta and Company Inc 370 Heritage Landing Pkwy St Augustine, FL 32092
Project Name	Heritage Landing - Preserve edge clearing		
Project Description	General tree		

Scope of Work

QTY	UoM/Size	Material/Description	Total
<hr style="border-top: 1px dashed black;"/>			
		757 Flowers St preserve edge	\$1,501.50
1.00	LUMP SUM	Remove large logs out of ditch line, lower grade to improve water flow to drain to help reduce flooding behind homes, and cut and drop one dead tree blocking water flow	

Images

hlp1



hlp2



THIS IS NOT AN INVOICE

This proposal is valid for thirty (30) days unless otherwise approved by Contractor's Senior Vice President
5811 County Rd 305, Elkton, FL 32033 ph. fax

Proposal for Extra Work at Heritage Landing @ WGV

hlp3



hlp4



hlp5



hlp6



THIS IS NOT AN INVOICE

This proposal is valid for thirty (30) days unless otherwise approved by Contractor's Senior Vice President
5811 County Rd 305, Elkton, FL 32033 ph. fax

Proposal for Extra Work at Heritage Landing @ WGV

hlp7



For internal use only

SO# 8675491
JOB# 460802023
Service Line 300

Total Price \$1,501.50

THIS IS NOT AN INVOICE

This proposal is valid for thirty (30) days unless otherwise approved by Contractor's Senior Vice President
5811 County Rd 305, Elkton, FL 32033 ph. fax

TERMS & CONDITIONS

1. The Contractor shall recognize and perform in accordance with written terms, written specifications and drawings only contained or referred to herein. All materials shall conform to bid specifications.
2. **Work Force:** Contractor shall designate a qualified representative with experience in landscape maintenance/construction upgrades or when applicable in tree management. The workforce shall be competent and qualified, and shall be legally authorized to work in the U.S.
3. **License and Permits:** Contractor shall maintain a Landscape Contractor's license, if required by State or local law, and will comply with all other license requirements of the City, State and Federal Governments, as well as all other requirements of law. Unless otherwise agreed upon by the parties or prohibited by law, Customer shall be required to obtain all necessary and required permits to allow the commencement of the Services on the property.
4. **Taxes:** Contractor agrees to pay all applicable taxes, including sales or General Excise Tax (GET), where applicable.
5. **Insurance:** Contractor agrees to provide General Liability Insurance, Automotive Liability Insurance, Worker's Compensation Insurance, and any other insurance required by law or Customer, as specified in writing prior to commencement of work. If not specified, Contractor will furnish insurance with \$1,000,000 limit of liability.
6. **Liability:** Contractor shall not be liable for any damage that occurs from Acts of God defined as extreme weather conditions, fire, earthquake, etc. and rules, regulations or restrictions imposed by any government or governmental agency, national or regional emergency, epidemic, pandemic, health related outbreak or other medical events not caused by one or other delays or failure of performance beyond the commercially reasonable control of either party. Under these circumstances, Contractor shall have the right to renegotiate the terms and prices of this Contract within sixty (60) days.
7. Any illegal trespass, claims and/or damages resulting from work requested that is not on property owned by Customer or not under Customer management and control shall be the sole responsibility of the Customer.
8. **Subcontractors:** Contractor reserves the right to hire qualified subcontractors to perform specialized functions or work requiring specialized equipment.
9. **Additional Services:** Any additional work not shown in the above specifications involving extra costs will be executed only upon signed written orders, and will become an extra charge over and above the estimate.
10. **Access to Jobsite:** Customer shall provide all utilities to perform the work. Customer shall furnish access to all parts of jobsite where Contractor is to perform work as required by the Contract or other functions related thereto, during normal business hours and other reasonable periods of time. Contractor will perform the work as reasonably practical after the Customer makes the site available for performance of the work.
11. **Payment Terms:** Upon signing this Agreement, Customer shall pay Contractor 50% of the Proposed Price and the remaining balance shall be paid by Customer to Contractor upon completion of the project unless otherwise, agreed to in writing.
12. **Termination:** This Work Order may be terminated by the either party with or without cause, upon seven (7) workdays advance written notice. Customer will be required to pay for all materials purchased and work complete to the date of termination and reasonable charges incurred in demobilizing.
13. **Assignment:** The Customer and the Contractor respectively, bind themselves, their partners, successors, assignees and legal representative to the other party with respect to all covenants of this Agreement. Neither the Customer nor the Contractor shall assign or transfer any interest in this Agreement without the written consent of the other provided, however, that consent shall not be required to assign this Agreement to any company which controls, is controlled by, or is under common control with Contractor or in connection with assignment to an affiliate or pursuant to a merger, sale of all or substantially all of its assets or equity securities, consolidation, change of control or corporate reorganization.
14. **Disclaimer:** This proposal was estimated and priced based upon a site visit and visual inspection from ground level using ordinary means, at or about the time this proposal was prepared. The price quoted in this proposal for the work described, is the result of that ground level visual inspection and therefore our company will not be liable for any additional costs or damages for additional work not described herein, or liable for any incidents/accidents resulting from conditions, that were not ascertainable by said ground level visual inspection by ordinary means at the time said inspection was performed. Contractor cannot be held responsible for unknown or otherwise hidden defects. Any corrective work proposed herein cannot guarantee exact results. Professional engineering, architectural, and/or landscape design services ("Design Services") are not included in this Agreement and shall not be provided by the Contractor. Any design defects in the Contract Documents are the sole responsibility of the Customer. If the Customer must engage a licensed engineer, architect and/or landscape design professional, any costs concerning these Design Services are to be paid by the Customer directly to the designer involved.

15. **Cancellation:** Notice of Cancellation of work must be received in writing before the crew is dispatched to their location or Customer will be liable for a minimum travel charge of \$150.00 and billed to Customer.

The following sections shall apply where Contractor provides Customer with tree care services:

16. **Tree & Stump Removal:** Trees removed will be cut as close to the ground as possible based on conditions to or next to the bottom of the tree trunk. Additional charges will be levied for unseen hazards such as, but not limited to concrete brick filled trunks, metal rods, etc. If requested mechanical grinding of visible tree stump will be done to a defined width and depth below ground level at an additional charge to the Customer. Defined backfill and landscape material may be specified. Customer shall be responsible for contacting the appropriate underground utility locator company to locate and mark underground utility lines prior to start of work. Contractor is not responsible damage done to underground utilities such as but not limited to, cables, wires, pipes, and irrigation parts. Contractor will repair damaged irrigation lines at the Customer's expense.
17. **Waiver of Liability:** Requests for crown thinning in excess of twenty-five percent (25%) or work not in accordance with ISA (International Society of Arboricultural) standards will require a signed waiver of liability.

Acceptance of this Contract

By executing this document, Customer agrees to the formation of a binding contract and to the terms and conditions set forth herein. Customer represents that Contractor is authorized to perform the work stated on the face of this Contract. If payment has not been received by Contractor per payment terms hereunder, Contractor shall be entitled to all costs of collection, including reasonable attorneys' fees and it shall be relieved of any obligation to continue performance under this or any other Contract with Customer. Interest at a per annum rate of 1.5% per month (18% per year), or the highest rate permitted by law, may be charged on unpaid balance 15 days after billing.

NOTICE: FAILURE TO MAKE PAYMENT WHEN DUE FOR COMPLETED WORK ON CONSTRUCTION JOBS, MAY RESULT IN A MECHANIC'S LIEN ON THE TITLE TO YOUR PROPERTY

Customer

Signature	Title	Property Manager
Lourens Erasmus	Date	June 05, 2025
Printed Name		

BrightView Landscape Services, Inc. "Contractor"

Signature	Title	Account Manager
Steven C. McAvoy Jr.	Date	June 05, 2025
Printed Name		

Job #:	460802023		
SO #:	8675491	Proposed Price:	\$1,501.50



Access Point

Drain

765

757

753

749

Tab 3

***HERITAGE LANDING COMMUNITY
DEVELOPMENT DISTRICT***

**REQUEST FOR PROPOSALS
FOR
SITE AND AMENITY MANAGEMENT SERVICES**

_____, 2025

TABLE OF CONTENTS

1. *General Information for Proposers*
2. *General Description of District Facilities to be Managed*
3. *Scope of Services Needed*
 - Amenity Manager
 - Janitorial Maintenance
 - Pool Maintenance
 - General Facility Maintenance
4. *Proposal Forms*
 - A. General Proposer Information
 - B. Experience
 - C. Pricing
5. *Site Plan*

1. GENERAL INFORMATION FOR PROPOSERS

HERITAGE LANDING COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS FOR SITE AND AMENITY MANAGEMENT
SERVICES

The Heritage Landing Community Development District (the “District”) is seeking proposals from qualified firms interested in providing site and amenity management services for the District’s facilities. These services are considered contractual services under Florida law and are not required to be competitively bid. In order to submit a proposal, each Proposer must be authorized to do business in Florida, hold all required state and federal licenses in good standing, and otherwise meet any applicable requirements set forth by the District. The agreement for these services shall have a term commencing on October 1, 2025, and ending on September 30, 2026 (“FY 2026”).

All proposals should include the following information, among other things described herein:

- A. Completed proposal forms as set forth herein.
- B. At least 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(s).
- C. Complete pricing showing the total cost of providing the services, broken down as set forth on the following price proposal form. For any subcontractor being proposed, the total amount proposed to be paid by the District for these services shall be segregated between the actual funds being paid to the subcontractor and the mark up being charged by Proposer. Three years of pricing SHALL be included by the Proposer.

Firms desiring to provide a proposal should submit a copy of the proposal via e-mail no later than _____, 2025 at 5:00 p.m. (EST) to _____ at _____, e-mail _____.

Price will be one factor used in determining the proposal that is in the best interest of the District, but the District explicitly reserves the right to make such award to other than the lowest price proposal or to make no award at all. The District has the right to reject any and all proposals and waive any technical errors, informalities, or irregularities if it determines in its discretion it is in the best interest of the District to do so.

Nothing herein shall be construed as or constitute a waiver of District’s limitations on liability contained in Section 768.28, *Florida Statutes*, or other statute or law.

Any and all questions relative to this project shall be directed in writing by e-mail no later than _____, 2025 only to _____, with an e-mail copy to _____.

Mandatory Onsite Tour: All Proposers submitting a response to this RFP shall attend an onsite tour on _____, 2025 at __:__.M.

DATE	EVENT
_____, 2025	RFP Available
_____, 2025 __:00 .m.	Mandatory Onsite Tour
_____, 2025 __:00 .m.	Deadline for Questions
_____, 2025 __:00 .m.	Proposals Due

2. GENERAL DESCRIPTION OF DISTRICT FACILITIES TO BE MANAGED

The Heritage Landing Community Development District consists of approximately 597 acres of land located entirely within St. Johns County, Florida. The District owns, operates, and maintains various common areas, including ponds, landscape tracts, conservation areas, and an amenity center that includes a clubhouse, fitness room, pools, sports courts and fields, a playground and other related facilities. A site plan of the facility is included with this package.

3. SCOPE OF MANAGEMENT SERVICES NEEDED

1. Amenity Management
2. Field Operations (Maintenance, Janitorial, Capital Planning & Vendor oversight)
3. Lifestyle (Events)
4. Lifeguards
5. Programming (Lessons, Group Fitness, Camps, Food Trucks, etc.)
6. Athletics

Job Descriptions: Job descriptions for the positions above are included herein.

Office Hours:

October – February: Staff are on duty till 10pm *when the water is warm enough* for residents to swim. Staff will clear the pool deck at 10pm.

Monday: 1pm - 6pm
Tuesday - Thursday: 10am - 6pm
Friday - Saturday: 10am - 7pm
Sunday: 10am - 6pm

March – September: Staff are on duty every night until 10pm to clear the pool deck.

Monday: 1pm - 7pm
Tuesday - Thursday: 10am - 7pm
Friday - Saturday: 10am - 8pm
Sunday: 10am - 7pm

JOB DESCRIPTIONS

Heritage Landing Job Scopes

General Manager

Job Scope Summary: The General Manager provides professional full-time management of the District's assets and all District-related resident programs and services, and comprehensive leadership of all team members. At Heritage Landing, the General Manager position incorporates general management of the contract and direct management of field operations and facility and pool maintenance. The General Manager maintains direct reporting to the CDD and District Management of all aspects of amenity and field operations. The General Manager shall propose repairs and capital improvements to maximize the value and benefits of the District's property and provide the oversight that maximizes the services and programs that will encourage residents to fully enjoy the amenities available to them. The General Manager shall also recommend adjustments to the annual budget to strengthen the District's position and extend the value of the District's assets.

Routine Duties:

1. General Management:
 - a. Understand and carry out the terms and conditions of the Management Contract.
 - b. Identify Action Items and analyze the advantages and disadvantages of various solutions to problems and make informed recommendations to the Board of Directors.
 - c. Implement standard operating procedures that are consistent with the industry. Interface regularly with internal customers and external vendors and clients.
 - d. Work closely with the Amenity Manager in the design and execution of events and communications, and in the consistent performance and improvement of administrative duties.
 - e. Manage all contractors and vendors that perform work for the District.
 - f. Interact with all professionals and contractors to find new and improved ways of performing duties and service processes.
 - g. Respond to emails from vendors, board members, residents, etc. and answer where appropriate.
 - h. Meet daily with the Amenity Manager regarding the day's tasks and administrative duties.
 - i. Discuss all events, resident programs, resident concerns, vendor relations, employee issues, internal processes, etc.
 - j. Develop and maintain an effective, ongoing resident relations plan; implement initiatives; and maintain an operating environment to achieve a superior level of resident services.
 - k. Work closely with the District Manager on district issues.
 - l. Work closely with Vesta to ensure that all contract requirements are met.
 - m. Research board-driven initiatives.
 - n. Coordinate activities with corporate support staff, including Human Resources and Accounting.
 - o. Implement an EAP for the facility and review the EAP with staff quarterly.
 - p. Implement a detailed storm response for major storms and hurricanes. The General Manager will be the point of contact between emergency services, landscapers, and

other vendors that will possibly be needed. The GM will communicate closely with the District Manager, Board of Directors and maintenance staff on any reported or observed damages.

2. Field Operations & Maintenance:

- a. Inspect the community and make common-area maintenance recommendations.
- b. Oversee all ongoing maintenance projects.
- c. Continuously look for possible improvements, repairs, or replacements that need to be made across the District's property.
- d. Perform repairs or replacements where needed.
- e. Assist the maintenance manager in any and all duties that need an extra hand.
- f. Perform cleaning, water chemistry and equipment inspections or repairs.
- g. Walk the amenity center and pool deck to ensure everything is in order and take action to make repairs or ensure facility cleanliness.
- h. Meet with the maintenance manager daily to review immediate needs and schedule work for long-term projects.
- i. During certain times of the year, the GM blows off the parking lot, tennis courts, pool deck, if needed.
- j. Help with pool cleaning and water chemistry after storms.
- k. Work on any maintenance issues or emergencies that come up during the day.
- l. Provide close oversight of the landscaper, pond company, fire system, HVAC, gym maintenance, and other District contractors.
- m. Assist with pressure washing during the winter.

Monthly Duties:

- a. Prepare for, attend, and present General Manager's report and Financial Reports, and provide a summary of Action Items from each meeting to every supervisor.
- b. Review and process all Vendors billing.
- c. Work closely with contractors, board members, District Counsel and District Manager in contract negotiations.

Annual/Seasonal Duties:

- a. Develop and submit annual budget(s), and provide thorough analysis to support all recommendations for the repair or improvement of the District's assets.
- b. Renew 49 rental agreements for the District's RV and Boat Storage Facility.

Heritage Landing Job Scopes

Amenity Manager

Job Scope Summary: The Amenity Manager maintains daily operations of the amenity and recreational facilities and works to provide residents the opportunity to enjoyment of the amenity facilities to their fullest every time they visit. The Amenity Manager is responsible for ensuring the policies of the amenity facilities are equally and consistently enforced to allow a diverse population to peacefully enjoy the amenities. The Amenity Manager keeps open lines of communication with the CDD Board and District Manager regarding all activities, incidents, and trends at the amenity center.

Routine Duties:

- a. Act as an ambassador of the community on behalf of the District.
- b. Provide a warm, welcoming atmosphere for our current and future residents and staff.
- c. Monitor cleanliness of clubhouse and facilities through checklists and reviews.
- d. Oversee general day-to-day operations.
- e. Act as a leader with a strong sense of purpose and responsiveness.
- f. Engage with residents and staff and be a community builder.
- g. File and retrieve records and correspondence as needed for Corporate and District.
- h. Hire and train staff and attendants.
- i. Schedule facility and event attendants.
- j. Schedule extra staff for area rentals.
- k. Provide general oversight of District and lifestyle vendors.
- l. File and retrieve records and correspondence as needed for research.
- m. Always maintain a spotless appearance of the amenities.
- n. Schedule events and rentals and ensure against any calendar conflicts.
- o. Create and monitor four large events each year.
- p. Create and execute other smaller events that are requested and approved by The Board.
- q. Create event flyers, hard-copy and online sign-ups, event budgets, communicate with residents, vendors, staff, and execute events.
- r. Assist with budgeting and budget planning.
- s. Make recommendations to amend the District Amenity Facility Policies.
- t. Ensure that the Amenity Facility Policies are being enforced to protect the CDD from any liability.
- u. Provide communications to the community through e-blasts, website, bulletin board, and marquee.
- v. Purchase and supply all cleaning and office supplies.
- w. Receive deliveries when assigned.
- x. Perform other related duties as required.

Monthly Duties:

- a. Prepare for, attend, and present Manager's Reports and Financial Reports at every CDD meeting, and present a list of action items from each meeting to each supervisor so staff and supervisors are up to date with all activities and projects.
- b. Create office staff schedules using availability charts from every employee.

- c. Communicate with program directors and vendors.
- d. Perform payroll for all onsite staff and ensure all allocations are correct.
- e. Work closely with corporate accounting department in regards to billing and invoicing.
- f. Have a close relationship with HR about hiring, terminations, corrective actions, if any, and training of employees.

Annual/Seasonal Duties:

- a. Hire up to 30 new attendants and lifeguards for seasonal positions.
- b. Train new seasonal staff.
- c. Update all program contracts with new insurance and contract terms.
- d. Provide revenue share documents to The District on a quarterly basis.
- e. Communicate with summer program vendors.
- f. Work with YMCA to provide summer camp. Assist residents who want to sign up for camp or who have any questions about camp.

Heritage Landing Job Scopes

Clubhouse Staff

Job Scope Summary: The Clubhouse Staff represent the best character of Heritage Landing and plays a vital role in creating a positive, welcoming environment that supports each resident's highest and best use of the amenities. The Clubhouse Staff will provide the highest level of service that each Patron needs to complete administrative tasks or to simply enjoy their visit to the gym or pool. With support from management, the Clubhouse Staff uses policy and diplomacy to create a peaceful environment, while also maintaining the facility's cleanliness and appearance.

Routine Duties:

- a. Cheerfully greet residents, prospective residents, and guests.
- b. Provide a highly visible, positive presence in and around the facility.
- c. Ensure all guests are registered properly.
- d. Provide tours of the facility to new residents and to prospective buyers.
- e. Tactfully enforce District policies.
- f. Swiftly address conflicts or concerns.
- g. Assist with community special events.
- h. Complete a wide array of administrative duties such homeowner registrations, area rental reservations, program registrations, answering phones and emails, maintaining office organization, ordering office and janitorial supplies, assisting residents face-to-face with questions or concerns.
- i. Provide additional cleaning throughout the facility.
- j. Collect money from mobile vendors and provide them with a receipt.
- k. Put out food truck signage.
- l. Update the community marquee when requested by the amenity manager.
- m. Write reports for incidents, first aid, and injuries.
- n. Provide contact information to the residents for the HOA, Management, and District Management.
- o. Create youth IDs and record proper identification. Monitor security cameras and respond to situations or alert Management.
- p. Provide managers with frontline information regarding safety issues, processes, or on-going resident concerns.
- q. Test pool chemicals when needed.

Monthly Duties:

- a. Audit systems to ensure all guests are registered properly.
- b. Audit Youth ID records to keep current.
- c. Study continuously all current and newly adopted policies.
- d. Role play with Amenity Manager to improve conflict resolution.
- e. Do an inventory check on all supplies and materials needed for cleaning the facility.
- f. Assist GM in managing the RV lot.

Annual/Seasonal Duties:

- a. Assist with community special events.
- b. Help decorate the facility and bulletin boards.
- c. Provide assistance to the Swim Team and visiting families during swim meets and address any issues during swim practices.

Heritage Landing Job Scopes

Full-Time Maintenance and Pool Technician

Job Scope Summary: This position performs all routine maintenance of all District property and is responsible for the consistent maintenance and safety of all recreational bodies of water. This position also manages support maintenance staff.

Routine Duties:

- a. Walk the property to check for trash or property damage
- b. Unlock the facility restrooms
- c. Take pool chemistry readings and make adjustments to pool chemicals where needed (early morning and after lunch) to ensure correct chemistry and clarity of pool water.
- d. Regularly test pool water for pH; chlorine; presence of bacteria, algae, or contaminants; and other data. Note that testing by any other staff shall not substitute for Pool Technician's obligation to regularly test for proper chemical levels.
- e. Check and log chemical inventory and alert management when supplies are needed.
- f. Treat drain stains and introduce Phosphate treatments as needed (report extraordinary chemical needs/usages to Field Operations Manager)
- g. Clean pools when needed and inspect equipment in and around pools
- h. Perform pool filter cleanings and equipment maintenance regularly
- i. Maintain daily logs outlining chemical usage, water quality, repairs, and supplies.
- j. Routine QC inspections and checklists for Health Department regulations, including but not limited to:
 - Check pool water quality and complete appropriate form equivalent to DH Form 9213/98 Swimming Pool Report, as required by Chapter 64E-9.004(13), FAC, each site visit.
 - Conduct and record necessary tests for proper pool chemicals as required in order maintaining water quality levels within requirements of Chapter 64E-9.004(1)(d).
- k. Monitor the condition of all fencing and adjoining gates and resolve any issues
- l. Blow off pool deck, common areas, parking lots, courts and sidewalks.
- m. Perform any type of cleaning or maintenance in restrooms, gym, common areas, offices, and anywhere on CDD property, as needed.
- n. Meet with GM to update the project list by indicating which projects have been completed, which projects are in progress, and identify repairs that need to be added
- o. Drive property on a daily basis to check for trash and any maintenance issues
- p. Perform highly skilled painting, carpentry, masonry and any other type of maintenance job that is needed.
- q. Schedule and supervise the general maintenance.
- r. Operate hand and power tools used in performing maintenance and repair tasks.
- s. Utilize work methods and procedures, which promote a safe working environment for employees and the public.
- t. Communicate effectively, both verbally and in writing, with staff, vendors, and residents. Follow verbal and written instructions from upper management.
- u. Maintain upkeep of all common area lights and emergency lighting.

- v. Maintain chemical balance at pool and spa, along with upkeep and maintenance of pool equipment.
- w. Perform related duties as assigned by supervisor or manager.

Monthly Duties:

- a. Maintain all maintenance logs, inventory, and inspection records.
- b. Advise the District of any necessary repairs, cleaning, or replacement items required due to normal wear and tear, "Acts of God," or vandalism. Such repairs shall be billed separately upon written approval of the District
- c. Inspect FPL privacy fence and make repairs to panels that have been vandalized or broken.
- d. Pressure washes all curbs and sidewalks within the amenity center, pool decks and other areas.
- e. Establish and maintain cooperative and professional working relationships with those individuals and businesses contacted in the course of work.
- f. Complete monthly inspections of the fire suppression pump and other equipment. The inspection includes an overview of the exterior condition of the building, including paint, stucco, expansion joints, light fixtures, doors, windows, etc.
- g. Schedule and meet with vendors to do maintenance and repairs of the building.
- h. Meet regularly with scheduled District vendors i.e., pond, landscaping, etc.
- i. Provide cleaning and limited maintenance to all exercise equipment.
- j. Inspect of all HVAC units located in common areas.

Heritage Landing Job Scopes

Life Guard/Pool Monitors

Job Scope Summary: The lifeguard and pool monitor assist in the safe operation of the District's pool slide. Lifeguards provide supervision of the pools and slide during pool slide operation to enforce safe use of these facilities based upon District and Department of Health policies. These positions support the safety of pool patrons and assist with aquatic programs. Work is performed under the general supervision of an aquatics supervisor.

Responsibilities and Duties:

Head Lifeguard/Aquatic Supervisor:

- a. Establish weekly schedule and plan daily work assignments.
- b. Train and coach employees.
- c. Inspect staff work performance.
- d. Demonstrate leadership and provide additional training to staff.
- e. Communicate effectively with staff.
- f. Perform duties consistent with the American Red Cross Lifesaving Course.
- g. Monitor pool-related activities closely throughout shift and identify any safety issues.
- h. Direct swimmers out of the pool in hazardous conditions.
- i. Open the pools each day and/or close the pools each evening, when scheduled.
- j. Monitor weather reports closely to ensure safety of guests.
- k. Maintain a clean environment in and around the pool.
- l. Aid patrons when appropriate or necessary.
- m. Maintain and stay current in American Red Cross Lifesaving certifications through additional training.
- n. Organize and execute American Learn-to-Swim Programs.
- o. Direct reporting to management of daily aquatic concerns/issues/happenings.
- p. Maintain and file all daily weather logs, swimmer logs, Lifeguard end of shift reports, and incident reports.

Lifeguard:

- a. Perform duties consistent with the American Red Cross Lifesaving Course.
- b. Open the pool each day and close it down each evening, depending on schedule and hours.
- c. Monitor pool-related activities closely throughout shift and identify any safety issues.
- d. Direct swimmers out of the pool in hazardous conditions.
- e. Monitor weather reports closely to ensure safety of guests.
- f. Oversee pool party participants
- g. Maintain a clean environment in and around the pool.
- h. Provide assistance to patrons when appropriate or necessary.
- i. Perform cleaning duties during thunder or down time.
- j. Maintain and stay current in American Red Cross Lifesaving Certifications through trainings.
- k. Administer slide swim test and issue wristbands as needed.

Pool Monitor:

- Monitor the top of the pool slide, when open. Actively monitor the pool decks and intervene in any situation that may create a safety issue in or around the pools or anywhere in the amenity center.

Heritage Landing Job Scopes

Part-Time Maintenance and Pool Technician

Job Scope Summary: This maintenance staff position, under limited supervision, performs routine maintenance and projects as assigned.

Routine Duties:

- a. Maintain all exterior areas of buildings, including brushing debris from walls, ceilings, and all outdoor surfaces.
- b. Maintain and clean all interior and exterior furniture and fixtures such as tables, fans and pool lounge chairs.
- c. Clean the pools twice a week by vacuuming, skimming, and tile brushing.
- d. Clean up all trash on the pool deck and empty the pool deck trashcans.
- e. Inspect the grills and clean them.
- f. Pick up trash in and around the amenity center and empty trashcans.
- g. Drive CDD property pick up trash and empty trash cans out in the pocket parks.
- h. Drive down FPL fence to inspect the fence and clean up any debris.
- i. Straighten out the pool deck furniture.
- j. Maintain general appearance of all indoor spaces by vacuuming carpet, dusting of all fixtures, mopping floors, cleaning windows, bathrooms, counters and tiled areas when needed.
- k. Provide simple repairs as needed.
- l. Report any deficiencies or possible problems directly to the General Manager.

Weekend Duties:

- a. 2 hours each on a Saturday and Sunday morning.
- b. Pick up trash across the CDD property around the clubhouse, fields and courts.
- c. Check bathrooms and restock if needed.
- d. Skim pools if needed
- e. Empty trash cans if needed.

Monthly Duties:

- a. Pick up trash in the landscaping that isn't easily accessible.
- b. Clean windows around amenity center.
- c. Clean large light fixtures with soap and a rag.
- d. Perform pressure washing when needed.
- e. Maintain tennis courts including surface, wind screens and nets.

4. **PROPOSAL FORMS**

4.A.
GENERAL PROPOSER INFORMATION

• *Proposer General Information:*

Proposer Name _____

Street Address _____

P. O. Box (if any) _____

City _____ State _____ Zip Code _____

Telephone _____ Fax no. _____

1st Contact Name _____ Title _____

2nd Contact Name _____ Title _____

Parent Company Name (if any) _____

Street Address _____

P. O. Box (if any) _____

City _____ State _____ Zip Code _____

Telephone _____ Fax no. _____

1st Contact Name _____ Title _____

2nd Contact Name _____ Title _____

- *Company Standing:*

Proposer's Corporate Form: _____
(e.g., individual, corporation, partnership, limited liability company, etc.)

In what State was the Proposer organized? _____ Date _____

Is the Proposer in good standing with that State? Yes ___ No ___

If no, please explain _____

Is the Proposer registered with the State of Florida, Division of Corporations and authorized to do business in Florida? Yes ___ No ___

If no, please explain _____

- *What are the Proposer's current insurance limits?*

General Liability \$ _____

Automobile Liability \$ _____

Workers Compensation \$ _____

Expiration Date _____

- *Licensure* – Please list all applicable state and federal licenses, and state whether such licenses are presently in good standing:

4.B.
EXPERIENCE

- *Has the Proposer performed work for a community development district or master planned residential community in excess of 200 acres previously? Yes ___ No ___ If yes, please provide the following information for each project (attach additional sheets if necessary):*

Project Name/Location: _____

Contact: _____ Contact Phone: _____

Project Type/Description: _____

Dollar Amount of Contract: _____

Scope of Services for Project: _____

Dates Serviced: _____

- *List the Proposer's total annual dollar value of amenity center management and grounds maintenance management completed for each of the last five (5) years starting with the latest year and ending with the most current year:*

2020 = _____

2021 = _____

2022 = _____

2023 = _____

2024 = _____

- *Please provide the following information for each project that is similar to this project, and that you are currently undertaking, or have undertaken, in the past five years. Attach additional sheets if necessary.*

Project Name/Location: _____

Contact: _____ Contact Phone: _____

Project Type/Description: _____

Dollar Amount of Contract: _____

Your Company's Scope of Services for Project: _____

List of subcontractors used: _____

Is this a current contract? Yes ___ No ___

Duration of contract: _____

- *Has the Proposer, or any of its principals or supervisory personnel (e.g., owner, officer, or supervisor, etc.), been terminated from any amenity center management and/or grounds maintenance management contract within the past 3 years? Yes _____ No _____ For each such incident, please provide the following information (attach additional sheets as needed):*

Project Name/Location: _____

Contact: _____ Contact Phone: _____

Project Type/Description: _____

Dollar Amount of Contract: _____

Scope of Services for Project: _____

Dates Serviced: _____

Reason for Termination: _____

- *Has the Proposer been cited by OSHA for any job site or company office/shop safety violations in the past five years? Yes ___ No ___*

If yes, please describe each violation, fine, and resolution _____

Has the Proposer experienced any worker injuries resulting in a worker losing more than ten (10) working days as a result of the injury in the past five years? Yes ___ No ___

If yes, please describe each incident _____

- *Please state whether or not the Proposer or any of its affiliates are presently barred or suspended from bidding or contracting on any state, local, or federal contracts? Yes ___ No ___ If yes, please provide:*

The names of the entities _____

The state(s) where barred or suspended _____

The period(s) of debarment or suspension _____

Also, please explain the basis for any bar or suspension:

- *List any and all governmental enforcement actions (e.g., any action taken to impose fines or penalties, licensure issues, permit violations, consent orders, etc.) taken against the Proposer or its principals, or relating to the work of the Proposer or its principals, in the last five (5) years. Please describe the nature of the action, the Proposer's role in the action, and the status and/or resolution of the action.*

-
- *List any and all litigation to which the Proposer or its principals have been a party in the last five (5) years. Please describe the nature of the litigation, the Proposer's role in the litigation, and the status and/or resolution of the litigation.*

-
-
-
-
-
- *Please provide a detailed description of the benefits you provide your employees.*

-
-
-
-
-
- *Please provide resumes for all proposed salaried onsite staff and those providing direct corporate support.*

-
-
-
-
-
- *Please describe and provide examples of your approach to engagement with District residents, including, but not limited to eblasts, website, surveying, social media, etc.*

- *Please describe training provided to Proposer's employees. (HR, Job Specific, Certifications, etc.)*

- *Please describe your approach to quality assurance with respect to the services being proposed, including a description of the processes and/or tools used to ensure the quality of the services.*

- *Please describe the type of support onsite personnel will receive from offsite personnel. (Operational Management, Payroll Support, HR, IT, Accounts Payable, etc.)*

- *Please describe any additional services proposed and the additional costs for such services.*

- *Please provide examples of recent reports Proposer has prepared for similar sized communities. (Amenity Manager Report, Lifestyle Report, Event Recap, Project Tracker, etc.)*

Program References: Provide examples of similar programs as proposed that your firm is currently providing to other similar sized communities (what have you done elsewhere).

Program	Community Name	Total # of Households Occupied	2024 Total Annual Participants	2024 Total Revenue Provided to the CDD/HOA

4.C.
PRICING

Staffing Requirements & Fee Breakouts:

a. FY2026

Position	Hours a Week	Annual Hours	Gross Wage (1)	Direct Employee Burden (2)	Total Fee to CDD (3)
General Manager	40-50	Salaried			
Amenity Manager	40-50	Salaried			
Lead Clubhouse Staff	32	1,664			
Clubhouse Staff	55	2,856			
Maintenance Supervisor	40	2,080			
Maintenance Techs	36	1,872			
Lifeguard Supervisor (4)	Seasonal	48			
Head Lifeguards (4)	Seasonal	390			
Lifeguards (4)	Seasonal	2,810			
Totals		NA			

b. FY2027

Position	Hours a Week	Annual Hours	Gross Wage (1)	Direct Employee Burden (2)	Total Fee to CDD (3)
General Manager	40-50	Salaried			
Amenity Manager	40-50	Salaried			
Lead Clubhouse Staff	32	1,664			
Clubhouse Staff	55	2,856			
Maintenance Supervisor	40	2,080			
Maintenance Techs	36	1,872			
Lifeguard Supervisor (4)	Seasonal	48			
Head Lifeguards (4)	Seasonal	390			
Lifeguards (4)	Seasonal	2,810			
Totals		NA			

c. FY2028

Position	Hours a Week	Annual Hours	Gross Wage (1)	Direct Employee Burden (2)	Total Fee to CDD (3)
General Manager	40-50	Salaried			
Amenity Manager	40-50	Salaried			
Lead Facility Attendant	32	1,664			
Facility Attendants	55	2,856			
Maintenance Supervisor	40	2,080			
Maintenance Techs	36	1,872			
Lifeguard Supervisor (4)	Seasonal	48			
Head Lifeguards (4)	Seasonal	390			
Lifeguards (4)	Seasonal	2,810			
Totals		NA			

(1) Show as annual compensation for salaried and hourly rate for hourly employees at the beginning of the contracted year.

(2) Include cost of all expenses associated directly with staffing that position (benefits, payroll taxes, worker’s compensation insurance, etc.). Annual figure.

(3) The total charges to the District for providing the services. This cost may be broken out by line item or simply a total figure at the bottom of the table.

(4) Lifeguard staffing (4 total):

- 1- Lifeguard at top of water slide
- 1- Lifeguard at bottom of water slide
- 1- Lifeguard covering the lap pool
- 1- Lifeguard floater/pool deck monitoring/break coverage.

Pools are typically staffed the week of Spring Break and both Weekends; Weekends from Spring Break to when St John’s County schools get out; and then 7 days a week while students are out of school for summer break. Once school is back in session, then weekends only until Labor Day. Then Labor Day weekend is the last day of Lifeguard staffing.

- *Please detail any alternative staffing and fee structure that Proposer may use that is different from the framework provided herein that you would like the District to consider.*

5. **SITE PLAN**

5. SITE PLAN



Tab 4

RESOLUTION 2025-05

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE HERITAGE LANDING COMMUNITY DEVELOPMENT DISTRICT TO DESIGNATE THE DATE, TIME AND LOCATION OF A PUBLIC HEARING AND AUTHORIZATION TO PUBLISH NOTICE OF SUCH HEARING FOR THE PURPOSE OF ADOPTING REVISED AMENITY RATES.

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

WHEREAS, the Board of Supervisors of the District (“Board”) is authorized by Sections 190.011(5) and 190.035, *Florida Statutes*, to adopt rules, orders, rates, fees and charges pursuant to Chapter 120, *Florida Statutes*.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE HERITAGE LANDING COMMUNITY DEVELOPMENT DISTRICT:

SECTION 1. The District’s Board of Supervisors will hold a public hearing to adopt revised amenity rates, a proposed copy of which is attached hereto as **Exhibit A**. The Board will hold a public hearing on _____, 2025, at _:00 p.m., at the Heritage Landing Amenity Center, located at 370 Heritage Landing Parkway, St. Augustine, Florida 32092.

SECTION 2. At said public hearing, the Board will consider the rates and fees of the District as more particularly set forth in attached **Exhibit A**.

SECTION 3. The District Secretary is directed to publish notice of the hearing in accordance with Section 120.54, *Florida Statutes*.

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

PASSED AND ADOPTED THIS 12th DAY OF JUNE 2025.

ATTEST:

**HERITAGE LANDING COMMUNITY
DEVELOPMENT DISTRICT**

Secretary / Assistant Secretary

Chairperson, Board of Supervisors

EXHIBIT A: Proposed District Rates

EXHIBIT A

Exhibit A

Amended Amenity Rates

FEE TYPE	CURRENT RATE	PROPOSED RATE
Annual User Fee	\$2,500.00	
Access Card Replacement Fee	\$20.00	
25 Guest Limit Card	\$42.50	
Under 18 ID Card Replacement Fee	\$5.00	
Heritage Room Rental Fee	\$50.00	
Outdoor Patio Room Rental Fee	\$25.00	
Pool Shade Pavilion Rental Fee	\$25.00	
Picnic Pavilion Rental Fee	\$25.00	
Rental Deposit (All 4 Areas)	\$200.00	
Rentals Serving Alcohol Deposit	\$300.00	
Community Social Meeting Deposit	\$150.00	
RV Storage – Under 30 feet Fee	\$390.00	
RV Storage – 30 feet to 43 feet Fee	\$585.00	
RV Storage – 56 feet Fee	\$780.00	
RV Storage Renewal Late Fee	\$10.00	

	Area	Rental Fee	Time	Extra Staff	Deposit	Guests	Notes
Aberdeen	Social Hall and Patio	\$100.00	4 hours	\$125.00	\$250.00	74	
	Social Hall Patio Only	\$50.00	4 hours	\$0.00	\$250.00	20	
	Rec Pool Cabana	\$50.00	4 hours	\$0.00	\$250.00	25	
	Lap Pool Cabana	\$50.00	4 hours	\$0.00	\$250.00	25	
Bartram Springs	Social Hall	\$60.00	4-6 hours	4*Extra Staff Fee	\$300.00	75	
	Gazebo	\$25.00	4 hours		\$300.00	25	Lifeguard Required
	Deck Gazebo	\$25.00	4 hours		\$300.00	25	
	Field Gazebo	\$25.00	4 hours		\$300.00	25	
	Club Suite	\$0.00	4 hours	\$0.00	\$0.00	28	
	Fire Pit	\$25.00	4 hours	\$54.00	\$300.00	N/A	
Durbin Crossing	South Social Hall	\$140.00	4 hours	\$60.00	\$500.00	40	
	South Patio	\$40.00	4 hours	\$60.00	\$500.00	25	
	North Patio	\$40.00	4 hours	\$60.00	\$500.00	25	
MuraBella	Social Hall	\$50.00	4 hours		\$250.00	50	\$500 deposit for 26 to 50 guests
	Pool Patio (Gym)	\$25.00	4 hours		\$250.00	25	
	Pool Patio (Kitchen)	\$25.00	4 hours		\$250.00		
	Both Patios	\$50.00	4 hours	\$74.00	\$250.00		
Johns Creek	Community Room	\$60.00	4 hours min		\$200.00	50	One rental per day
	Breezeway	\$30.00	4 hours min		\$100.00	20	One rental per day
	Pergola	\$30.00	4 hours min		\$100.00	20	One rental per day
Palencia	Community Room	\$150-\$350	4 hours		\$250-\$500		\$200-\$300 cleaning fee
Trout Creek	Kayak Club Room (Mon-Thur.)	\$55/Hour	2 hour min.		\$205	75	\$505 deposit with Alcohol
	Kayak Club Room (Fri-Sun.)	\$80/Hour	2 hour min.		\$205	75	
	Shearwater Pavilion	\$55/Hour	2 hour min.		\$205	30	
	Conference Room	\$30/Hour	2 hour min.		\$205	10	

Payment Processing Options--Updated May 2025

	Annual Fee	Processing Fee	Trasaction Fee	Reader Cost	Terminal Cost	Funding
Sqaure	\$0.00	2.60%	\$0.15	\$49-59	\$299.00	Next Business Day
PayPal Zettle	\$0.00	2.29%	\$0.09	\$29-\$79	\$199.00	Next Business Day
Helcim	\$0.00	Interchange + 0.40% (Effective rate 1.8%-2.2%)	\$0.08	\$99.00		Next Business Day

Example: SQUARE Transaction Fees and Approximate Annual Costs

Rental Area	Rental Fee	Approx. Number of Parties (Trucks, Access Cards) Annually	Approx. Revenue	Service Fee for all Transactions is 2.6%	Calculated Service Fee	Transaction Fee is \$0.15 per Transaction	Total Processing Cost for Each Rental or Food Truck	If Fee Passed Thru to User
Heritage Room	\$50.00	55	\$2,750.00	0.026	\$1.30	\$0.15	\$1.45	\$51.45
Ourdoor Rentals	\$25.00	150	\$3,750.00	0.026	\$0.65	\$0.15	\$0.80	\$25.80
Food Trucks	\$25.00	153	\$3,825.00	0.026	\$0.65	\$0.15	\$0.80	\$25.80
Food Trucks	\$15.00	51	\$765.00	0.026	\$0.39	\$0.15	\$0.54	\$15.54
Access Cards	\$20.00	200	\$3,500.00	0.026	\$0.52	\$0.15	\$0.67	\$20.67

Rental Deposits are returned to the resident at the conclusion of the rental if no damages.

There is no fee to return a payment from Square, PayPal Zettle, and Helcim. We could also continue to collect checks for deposits.

Example: PayPal Zettle Transaction Fees and Approximate Annual Costs

Rental Area	Rental Fee	Approx. Number of Parties (Trucks, Cards) Annually	Approx. Revenue	Service Fee for all Transactions is 2.29%	Calculated Service Fee	Transaction Fee is \$0.09 per Transaction	Total Processing Cost for Each Rental, Food Truck, Access Card	If Fee Passed Thru to User
Heritage Room	\$ 50.00	55	\$ 2,750.00	0.0229	\$ 1.15	\$ 0.09	\$ 1.24	\$ 51.24
Ourdoor Rentals	\$ 25.00	150	\$ 3,750.00	0.0229	\$ 0.57	\$ 0.09	\$ 0.66	\$ 25.66
Food Trucks	\$ 25.00	153	\$ 3,825.00	0.0229	\$ 0.57	\$ 0.09	\$ 0.66	\$ 25.66
Food Trucks	\$ 15.00	51	\$ 765.00	0.0229	\$ 0.34	\$ 0.09	\$ 0.43	\$ 15.43
Access Cards	\$ 20.00	200	\$ 4,000.00	0.0229	\$ 0.46	\$ 0.09	\$ 0.55	\$ 20.55

Example: Helcim Transaction Fees and Approximate Annual Costs

Rental Area	Rental Fee	Approx. Number of Parties (Trucks, Cards) Annually	Approx. Revenue	Service Fee for all Transactions: Interchange + 0.40% (Effective rate 1.8%-2.2%)	Calculated Service Fee	Transaction Fee is \$0.08 per Transaction	Total Processing Cost for Each Rental, Food Truck, Access Card	If Fee Passed Thru to User
Heritage Room	\$ 50.00	55	\$ 2,750.00	0.02	\$ 1.00	\$ 0.08	\$ 1.08	\$ 51.08
Ourdoor Rentals	\$ 25.00	150	\$ 3,750.00	0.02	\$ 0.50	\$ 0.08	\$ 0.58	\$ 25.58
Food Trucks	\$ 25.00	153	\$ 3,825.00	0.02	\$ 0.50	\$ 0.08	\$ 0.58	\$ 25.58
Food Trucks	\$ 15.00	51	\$ 765.00	0.02	\$ 0.30	\$ 0.08	\$ 0.38	\$ 15.38
Access Cards	\$ 20.00	200	\$ 4,000.00	0.02	\$ 0.40	\$ 0.08	\$ 0.48	\$ 20.48

Best Credit Card Processing Options for Heritage Landing CDD (ChatGPT Deep Research)

The CDD needs a **cost-effective, reliable** way to accept **all major credit cards** (Visa, MasterCard, Amex, Discover) and **mobile wallets** (Apple Pay, Google Pay, etc.) with **physical card readers**. It should also have the flexibility to **add online payments** later, **excellent customer service**, and **no long-term contracts or cancellation penalties**. Below we identify the top processing companies that meet these requirements, compare their pricing and features, and highlight the best value option.

Requirements Summary

- **All Major Payments Accepted:** Must process Visa, MasterCard, American Express, Discover, plus support mobile wallet taps (Apple Pay, Google Pay, etc.).
- **In-Person Focus:** Provide **physical card readers** (chip and tap enabled) for on-site payments. (Online/website payment capabilities should be available for future use.)
- **Low Costs:** Emphasis on **minimal startup costs** (cheap or free card reader, no setup fees) and **low transaction fees**. Either flat-rate or interchange-plus pricing is acceptable, as long as overall cost is low for \$3.7k/month).
- **Customer Service & Terms:** Vendor should have **strong customer support** and **transparent, flexible terms** – no multi-year contracts or early termination fees.

With these criteria in mind, the **top three credit card processors** to consider are **Square**, **PayPal Zettle**, and **Helcim**. Each of these options meets the basic requirements (accepts all major cards & mobile wallets, offers in-person card readers, can expand to online payments, and has no long-term contract). Below is an overview of each option, followed by a comparison table and our recommendation for the best value.

1. Square

Square is one of the most popular payment solutions for small businesses due to its simplicity and robust feature set. It offers a **flat-rate pricing** model and a user-friendly POS system that can run on a smartphone or tablet.

- **Pricing:** No monthly fee. In-person transactions cost **2.6% + 15¢** per swipe/dip/tap (Visa, MC, Discover, and Amex all same rate). *Example:* a \$50 payment incurs about \$1.45 in fees. (Keyed-in or online payments cost higher rates if used later.) Square has *no setup fee* and provides a basic magstripe-only reader for free. For chip and

contactless payments, you'll need the **Square contactless+chip reader** (~\$49–\$59 one-time).

- **Features:** Square's POS app (free) is feature-rich – it supports sales tracking, inventory, receipts (text/email), tipping, and more. It accepts chip cards, contactless taps, and mobile wallet payments. **Apple Pay, Google Pay, Samsung Pay** are all accepted via the tap reader. Square also offers **easy expansion to online payments:** you can send invoices, payment links, or even set up a simple online storefront through Square at any time (online transactions are ~2.9%+30¢).
- **Customer Service:** Square has a large user community and an extensive online help center. Phone support is available during business hours (and 24/7 for certain paid plans), and there's no long-term contract required – you can stop using Square any time without penalty. Funds are deposited quickly (typically next business day, with instant deposit available for a small extra fee).
- **Pros:** Very **easy to set up and use** (no merchant account paperwork; just sign up online), no monthly fees or commitments, **reliable technology** with offline mode, and a comprehensive suite of POS and reporting tools included. The flat fee simplifies budgeting and all card types cost the same rate (no surcharges for Amex). Square's brand is well-trusted, and it's ideal for low-volume and in-person sales.
- **Cons:** The flat-rate **transaction fee (2.6%+15¢)** is a bit higher than some competitors' rates, which means slightly less cost savings on each transaction compared to interchange-plus models. For the CDD's volume, Square's fees are predictable but not the absolute cheapest. Additionally, Square's customer support, while generally good, is not 24/7 for the free plan and primarily accessed via online tickets or scheduled calls. Overall, Square prioritizes ease over rock-bottom processing cost – it's extremely convenient, though a portion of each payment (around 2.6%) goes to fees.

2. PayPal Zettle

PayPal Zettle is PayPal's in-person payment solution (formerly "iZettle"). It combines PayPal's familiar payment platform with a small card reader for face-to-face transactions. This option offers a **slightly lower flat rate** than Square and the benefit of PayPal's broad online payment ecosystem for future expansion.

- **Pricing:** No monthly fee. In-person transactions (chip, tap, or PayPal QR code) cost **2.29% + 9¢** per transaction. For example, a \$50 payment would incur about \$1.24 in fees – a bit less than Square. (Manually keyed entries are higher at 3.49%+9¢, but this would be rare if cards are present.) **Hardware cost:** the first Zettle card reader is

only **\$29** (one-time), and it supports chip and contactless payments. Additional readers are \$79 each. There are no setup fees or cancellation fees.

- **Features:** Zettle's card reader accepts all major credit/debit cards including Amex, and supports **contactless taps** for mobile wallets (**Apple Pay, Google Pay**, etc.). The system includes a mobile app (for smartphone or tablet) that functions as a basic POS – you can ring up sales, apply taxes, and send digital receipts. Inventory management and basic reporting are included, though somewhat simpler than Square's. Because it's PayPal-backed, you can easily **expand to online payments:** for instance, you could use PayPal Checkout on your website or send PayPal payment links/invoices. (Online PayPal transactions have different rates ~2.99%+49¢ for cards via website, but you only add those if needed later.) One unique feature is the ability to accept PayPal or Venmo payments via a QR code in-person (customers can scan and pay from their phone), which also uses the same 2.29%+9¢ rate.
- **Customer Service:** PayPal offers customer support via phone and messaging, and the service is contract-free. Account setup is quick (many organizations already have a PayPal Business account). Deposits from card payments go into your PayPal account usually within 1 day; from there you can transfer to your bank (instant transfers incur a small fee, standard transfers are free). **Note:** As with any large payment processor, there is a slight risk of account freezes or holds if unusual activity is detected (PayPal is known for security flags). However, at a modest, consistent volume like \$45k/year, this is uncommon.
- **Pros: Low transaction rate** for a flat-rate provider (2.29%+9¢ is among the lowest flat fees available). Minimal upfront cost – the first reader is heavily discounted. **No monthly fees or long contracts.** It's easy to add online payment options through the PayPal ecosystem (and many customers are comfortable with PayPal/Venmo). PayPal is a well-known, trusted name in payments.
- **Cons:** PayPal's POS features are not as robust as some competitors – Zettle covers the basics well but lacks some of Square's advanced POS bells and whistles. Customer support experiences can vary; while help is available, some users report that resolving account issues or reaching support can be slower compared to smaller dedicated processors. Additionally, if you refund a transaction (such as returning a deposit), PayPal, like most providers, does **not** return the original processing fee — meaning the CDD would eat the small fee on refunded deposits (this is generally true with any provider now). Overall, aside from those

considerations, there are few downsides: PayPal Zettle is a strong, low-cost choice for in-person payments.

3. Helcim

Helcim is a lesser-known but highly rated payment processor that offers **interchange-plus pricing** with no monthly fees. It's often recommended for small businesses seeking the **absolute lowest processing costs** and excellent customer service. Helcim operates more like a traditional merchant account but without the usual contract or fees, which can translate into big savings at the CDD's volume.

- **Pricing:** No monthly fee and no contract. Helcim uses an **interchange-plus model**: for in-person transactions, the rate is **interchange + 0.40% + \$0.08**. In practice, this usually works out to an effective rate around **1.8%–2.2% + \$0.08** for most credit cards (varies by card type). For example, on a \$50 Visa payment, if the interchange portion is say 1.6%+\$0.10, the total fee would end up roughly 2.0% + \$0.18 ≈ **\$1.18** – noticeably less than the flat rates of Square or PayPal. Debit cards would be even cheaper. There are **no setup or cancellation fees**. The only upfront cost is purchasing a card reader: Helcim's EMV-capable **card reader costs \$99** (one-time). This wireless reader connects via Bluetooth to a phone/tablet running Helcim's app (similar to Square/PayPal setup). *Note:* Helcim also offers a more advanced standalone terminal with printer for \$329, but that's optional and not necessary unless you want a countertop device.
- **Features:** Helcim's platform is quite feature-rich for the price. It accepts all major credit cards (Visa, MC, Amex, Discover) and supports contactless payments (**Apple Pay, Google Pay, etc.**). The Helcim mobile app (and desktop web portal) includes a built-in POS system with product catalog, inventory tracking, customer tracking, and invoice/receipt capability – all **included free** with the account (Helcim prides itself on providing all software tools at no extra cost). For future online needs, Helcim makes it easy to **expand to website payments**: you can use their **hosted payment pages, online store integration, invoice links, or even developer API** to accept payments online. Online transactions have a different rate (interchange + 0.50% + 25¢), which is still very competitive if the CDD adds web payments later. Importantly, Helcim does **not require any long-term contract** – it's month-to-month service.
- **Customer Service:** Helcim is known for **excellent customer service** and support. Being a smaller, specialized processor, they offer personalized phone and email support that gets high marks in reviews. They are transparent about fees and provide

detailed reporting for all transactions. Funding is reliable and timely (deposits typically within 1-2 business days directly to your bank). If any issues arise, Helcim’s team is responsive and helpful in resolving them.

- **Pros: Lowest processing fees** overall – at the CDD’s volume, Helcim’s interchange-plus rates will likely yield the **cheapest cost per transaction** among these options (saving potentially a few hundred dollars per year in fees compared to flat-rate providers). There are **no monthly fees, no PCI fees, and no cancellation fees**, which keeps costs predictable and low. The included software features (virtual terminal, POS, invoicing, etc.) mean you get a full-service merchant solution without nickel-and-diming. Helcim meets all requirements: it accepts all needed payment methods and has the capability for future online payments. Moreover, their **customer support is top-notch**, which is valuable if you ever need assistance.
- **Cons:** The upfront cost for hardware is higher – you must buy the \$99 card reader (however, this is a one-time cost that is quickly offset by lower fees). Also, with interchange-plus pricing, your exact percentage fee varies by card type (for example, a premium rewards or corporate card has higher interchange, so that transaction will cost more in fees than a basic debit card would). This adds a bit of complexity compared to flat rates; you’ll see slightly different fee amounts on different transactions. That said, Helcim is very transparent about this, and even in worst-case scenarios (premium cards), the fees are generally on par with Square/PayPal – while most other transactions will be cheaper. Finally, Helcim is a smaller provider, so it doesn’t have the same brand recognition as Square or PayPal; however, it is a well-established company in the payments industry with a strong reputation among those who have discovered it.

Comparison of Top Options

Below is a side-by-side comparison of Square, PayPal Zettle, and Helcim, focusing on pricing, features, and key pros/cons for Heritage Landing CDD’s needs:

Provider	Pricing & Fees (In-Person)	Key Features & Capabilities	Pros	Cons
Square	2.6% + 15¢ per card-present transaction. No monthly fee. Card	- Accepts Visa, MC, Discover, Amex at same rate. - Supports Apple Pay/Google Pay (contactless tap). - Free	- Easiest setup: no merchant acct needed, just sign up. - No contract; cancel anytime	- Flat rate is higher cost per txn than interchange-plus (could pay a

Provider	Pricing & Fees (In-Person)	Key Features & Capabilities	Pros	Cons
	reader: \$49–\$59 (one-time for chip+tap).	POS app with inventory, sales reports, etc.- Can add online payments (invoices, website) easily.	without fees.- Robust POS features and integrations (free).- Widely used, trusted brand for small business.	bit more in fees).- Phone support not 24/7 (business hours only for basic users).- Reader is not free (magstripe free but chip/tap reader ~\$50).
PayPal Zettle	2.29% + 9¢ per in-person transaction.No monthly fee.Card reader: \$29 for first device (\$79 add'l).	- Accepts all major cards incl. Amex at same rate.- Supports contactless wallets (Apple/Google Pay).- Basic POS app (product library, taxes, receipts).- PayPal/Venmo QR code payments at same rate (optional).- Easy expansion to online PayPal checkout or invoices.	- Low flat rate (slightly cheaper per swipe than Square).- No monthly/contract; simple to start using.- Leverages PayPal ecosystem (online payment ready).- Trusted by consumers (recognizable payment brand).	- POS features are more basic (not as feature-rich as Square).- Customer support can be slower; large provider with less personalized service.- Account holds possible if flags (rare at steady, low volume).- Refunds don't return fees (same as others).
Helcim (Best Value)	Interchange + 0.4% + 8¢ per transaction (≈ 1.9%–2.3% +	- Accepts all major cards (Amex included) via merchant acct.- Supports chip, tap, and mobile	- Lowest processing fees overall (you pay cost + small	- Must buy hardware upfront (reader ~\$99).- Fee %

Provider	Pricing & Fees (In-Person)	Key Features & Capabilities	Pros	Cons
	8¢ average). No monthly fees or contracts. Card reader: \$99 one-time.	wallets (Apple/Google Pay).- Free Helcim app/portal with full POS and invoicing tools.- Future-ready: online payments, recurring billing, etc. all available (interchange+0.5%+25¢ for card-not-present).- Deposits directly to your bank in 1-2 days.	margin).- No extra fees: no monthly, signup, gateway, or exit fees.- Excellent customer service and transparency.- All-in-one solution (POS, online payments, receipts) included free.	varies by card type (complexity of interchange-plus).- Smaller company (brand less known than Square/PayPal, but well-regarded).

(All three options have no long-term contracts or cancellation fees. All provide the core capability to accept Visa, MasterCard, Discover, and American Express, as well as contactless mobile wallet payments. They each offer ways to expand to online payments in the future. Pricing shown is for domestic card transactions; additional small fees may apply for things like chargeback incidents or foreign cards.)

Best Value Recommendation

Considering the CDD's modest volume and focus on low cost, **Helcim emerges as the best value option**. Helcim will minimize processing fees over the long run – its interchange-plus pricing is more cost-effective than the flat 2.6% or 2.29% rates, potentially saving a few hundred dollars annually in fees for a \$45k/year volume. It also provides top-notch customer support and all the needed features (in-person and online) without any monthly fee or commitment. The slightly higher upfront cost for the card reader is quickly offset by the ongoing savings. For an organization watching every dollar, Helcim offers the **lowest overall cost** and excellent service, making it an ideal fit.

That said, **Square** and **PayPal Zettle** are also strong choices and might be preferred if simplicity or immediate brand familiarity is the top priority. Square is extremely user-friendly and comes with a rich POS ecosystem, while PayPal Zettle offers a very competitive rate and seamless integration with PayPal's online payments. Both have no monthly fees and meet all the requirements, coming in just a bit higher in transaction cost than Helcim.

In summary: If **lowest fees and best value** are paramount, go with **Helcim**. If you prefer a more established plug-and-play system and are willing to pay a little more per transaction for it, **Square** or **PayPal Zettle** will serve the CDD well. All three options will let Heritage Landing CDD accept in-person card payments smoothly with minimal costs and no contractual burdens. The recommended choice is **Helcim, for its combination of lowest overall cost, flexibility, and great support.**

Tab 5



Heritage Landing CDD Meeting
June 12, 2025, 1:00 p.m.

Date of Report: May 29, 2025

Todd Myhill, Amenity Manager

• **Concluded Events: Memorial Day—No Board Action Required**

- 562 Residents came out to observe Memorial Day at the amenity center during our special event. We had a total of 759 residents and guests sign in throughout the day. Many residents appreciated the opportunity to stand and honor the memory of all who gave the ultimate sacrifice for our country.



- **Upcoming Special Events—No Board Action Required**
 - Freedom Day (Juneteenth), Thursday, June 19. Resident Dave Gullick will provide DJ music from 11:00 a.m. to 2:00 p.m. We'll have a food truck and giveaways.
 - Fourth of July, Friday, July 4, from 11:00 a.m. to 2:00 p.m. DJ music, catered hamburgers and hot dogs, games and prizes, and giveaways.
 - I'm currently working on a trip to VyStar Ballpark to see a Jumbo Shrimp baseball game over the summer. Negotiating a reduced price for Heritage Landing residents.
- **One Suspension Involving Property Damage—Board Review Required**
 - Review of suspension of a minor involving property damage from May 13, 2025. A minor drove his modified e-bike (rendering it an e-motorcycle) into the security fence at the aquatic facility causing minor damage. The minor has been suspended at least 30 days (until June 12), pending any decision by the board to extend the suspension.
 - Six other suspensions involving one unauthorized entry to the pool and five minors riding e-scooters without a helmet received a 30-day suspension.
- **Hammerhead Swim Meets—No Board Action Required**
 - I'm happy to report that the first Hammerheads home meet was a great success. The swim team provided excellent management of parking and controlled the side gate consistently throughout the meeting. We had only six vehicles park on the landscaped medians at the amenity center, so we'll place additional No Parking signs in those areas during the last three meets. We had an excellent day, May 31, and received ample compliments from the visiting community.
- **DiaBesties One-Week Camp—No Board Action Required**
 - There was a minor learning curve to start, but we have had an excellent experience with Jacksonville DiaBesties camp so far. It's an impressive show of support for the 40 campers involved by the 30 staffers who are participating.
- **YMCA Eight-Week Camp—No Board Action Required**
 - I'll report on the first week of YMCA's camp and update on revenue sharing.
- **Notice to Residents Regarding E-Bikes, Etc.—No Board Action Required**
 - An eblast was sent to residents on May 15 to notify residents about an issue with minors riding e-bikes, e-scooters, and e-motorcycles at the amenity center. We had 769 opens for this e-blast and have experienced a marked improvement at the amenity center. Staff continue to intervene to educate minors at the center.
- **General Facility Information**
 - All three music licenses have been renewed for the current year.
 - Tracked down the insurance client for the damaged traffic median and followed up with the client and the insurance company over several weeks and managed to get the claim completed and a check for \$6,811.66 sent to the District.



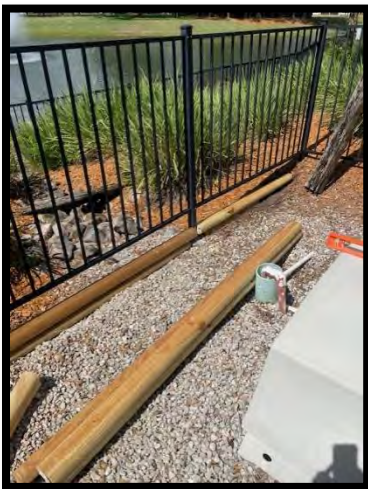
Heritage Landing CDD Meeting
June 12, 2025
Field Operations Manager Report
Date of report: 5/30/2025

AC vents:



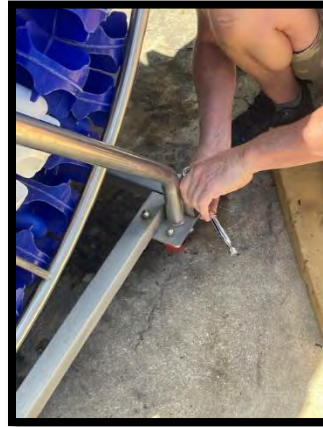
Some of the vents and diffusers were rusting out. We replaced the worst ones and then refurbished the diffusers since they are expensive.

Splash-pad pump area:



Installing some landscape ties to prevent further erosion.

Lap lane cart:



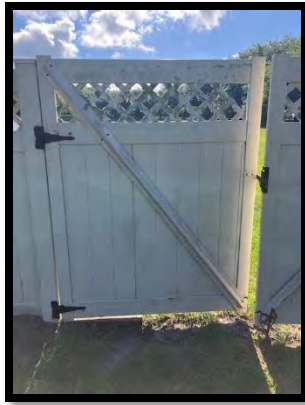
Replaced the wheels on the cart due to the sun and chlorine destroying them.

PVC fence repairs:



The new pvc fence along SR16 has been damaged, there is evidence of a black tire mark against it. Unfortunately, there are no witnesses to who might be the culprits. Some cameras WILL be installed in that area.

The gates along pond 13 were also damaged and broken from their hinges, these gates are being used by us, landscapers and pond maintenance. We installed new hinges and hardware; these gates will be locked with a pad lock and the keys shared with authorized personnel only.



Metal fence repairs:



The fence alongside the pump area was busted and we replaced a couple pickets, the gate to the playground broke and we used some metal braces to put it back together.

Tennis bathrooms:





Replaced a burned-out hand dryer and broken toilet paper dispenser.

Rain barrel modification:



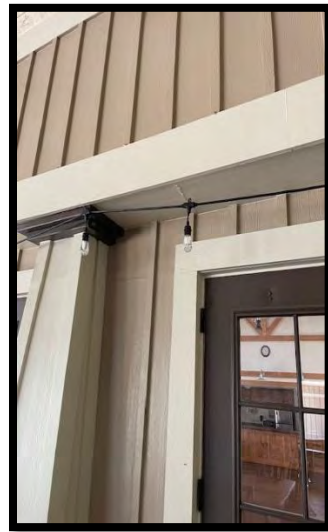
Built a new lid from the leftover PVC parts and re-routed the gutter spout.

Pier blocked:



Due to deterioration of the planks and fear of someone stepping into a wood splinter, we temporarily closed it off for use. Once the planks are replaced can we reopen that section.

Fire Sprinkler system:



During our 3-year test we discovered the leaks we were hoping to uncover. This way we now know where those holes are and can now be repaired. 2 holes were found inside the Heritage Room after two days of searching and opening drywall both were repaired with a new portion of pipe and couplings. 2 more holes presented themselves on the outside of the HR. 1 was patched by Wayne

Auto and the other by our team, we currently have 3 patched holes that still need permanent repairs. Since the last patch has been made our system has been staying pressurized with the compressor running minimally. This is a great indication that the system is not as bad as we thought. I have contacted Wayne Auto (current maintenance provider) Summit Fire in Jax and Cintas to discuss options and solutions to our situation. Cintas do not undertake large remodels like this; Summit provided me with some good info and was going to do a site visit. Wayne Auto came out and looked at the system. They are willing to come to a meeting and have discussions with the board to be able to determine the correct path forward.

We still must do the 10-year head test, and we all know that there is a chance we could fail, this will then require us to replace every head in the system with their down or up pipe. All 199 of them and it will be very expensive.

My recommendation is to do the 10-year test:

1. If we pass, we can look at doing repairs, modifications and adding extra drain points on the system.
2. If we fail, we must spend a lot of money replacing the heads, at that point we should look at abandoning the portions of the system that are inaccessible, like the Heritage Room and Fireplace area. Improve the layout, drainage points and have 75% of the system new pipe.



6869 Phillips Pkwy Dr. South Jacksonville Fl 32256

Phone: 904-997-0044

Service Report

Date: May 14 & 28, 2025

Biologists: Jim Charles
Rich Powers

Client: Heritage Landing CDD

Waterways: Thirteen Ponds

Pond 1: Pond was in fair condition. The water level is good. Treated for spatterdock on the 28th.



Pond 2: Pond was in good condition. The water level is normal. Fountain running normally.



Pond 3: Pond was in fair to good condition. The water level is good.



Pond 4: Pond was in fair to good condition. Both fountains are running. Treated for torpedo grass and spatterdock.





Pond 5: Pond was in good condition. The water level is normal.



Pond 6: Pond is in good condition. The water level is normal.



Pond 7: Pond was in fair condition. The water level is good. Treated for spatterdock and torpedo grass.





Pond 8: Pond was in good condition. The water level is normal. Fountain running normally.



Pond 9: Pond was in good condition. The water level is good.



Pond 10: Pond was in fair condition. The water level is good. Treated for torpedo grass and spatterdock on the 28th.



Pond 11: Pond was in good condition. The water level is normal



Pond 12: Pond was in good condition. The water level is normal.



Pond 13: Pond was in good condition. The water level is normal. Water clarity and color are good.



Jim Charles