

**THE OAKS AT SHADY CREEK  
COMMUNITY DEVELOPMENT DISTRICT  
BOARD OF SUPERVISORS  
REGULAR MEETING  
JANUARY 17, 2020**

# **THE OAKS AT SHADY CREEK COMMUNITY DEVELOPMENT DISTRICT I AGENDA JANUARY 17, 2020 AT 10:00 a.m.**

The Offices of Lennar Homes  
Located at 4600 W. Cypress Street, Ste. 200, Tampa, FL 33607

<b>District Board of Supervisors</b>	Chairman	Kelly Evans
	Vice Chairman	Laura Coffey
	Supervisor	Paulo Beckert
	Supervisor	Danny Schoonover
	Supervisor	Gill Hammond
<b>District Managers</b>	Meritus	Nicole Hicks
<b>District Attorney</b>	Straley Robin Vericker	John Vericker
<b>District Engineer</b>	Florida Land Design & Permitting	Paul Skidmore

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

The meeting will begin at **10:00 a.m.** Following the **Call to Order**, the public has the opportunity to comment on posted agenda items during the second section called **Audience Questions and Comments on Agenda Items**. Each individual is limited to **three (3) minutes** for such comment. The Board is not required to take action at this time, but will consider the comments presented as the agenda progresses. Following public comment, the meeting will proceed with the third section called **Business Items**. This section contains items for approval by the District Board of Supervisors that may require discussion, motions, and votes on an item-by-item basis. The fourth section is called **Consent Agenda**. The Consent Agenda section contains items that require the review and approval of the District Board of Supervisors as a normal course of business. The fifth section will be **Vendor and Staff Reports**. This section will allow Vendors and District Engineer and Attorney to update Board on work and to present proposals. Occasionally, certain items for decision within this section are required by Florida Statute to be held as a Public Hearing. In the event of a Public Hearing, each member of the public will be permitted to provide one comment on the issue, prior to the Board of Supervisors' discussion, motion, and vote.

The final section is called **Supervisor Requests**. This is the section in which the Supervisors may request Staff to prepare certain items in an effort to meet the District's needs.

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

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

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

The Oaks at Shady Creek Community Development District

Dear Board Members:

The Regular Meeting of the Board of Supervisors of The Oaks at Shady Creek Community Development District will be held on **Friday, January 17, 2020 at 10:00 a.m.** at The Offices of Lennar Homes, located at 4600 W. Cypress Street – Ste. 200, Tampa, FL 33607. The agenda is included below.

- 1. CALL TO ORDER/ROLL CALL**
- 2. PUBLIC COMMENT ON AGENDA ITEMS**
- 3. BUSINESS ITEMS**
  - A. Discussion on Resumes for Board of Supervisor Seats.....Tab 01
  - B. Appointment of Officers
  - C. Acceptance of Board Resignations
  - D. Consideration of Resolution 2020-01; Re-Designating Officers.....Tab 02
  - E. General Matters of the District
- 4. CONSENT AGENDA**
  - A. Consideration of Board of Supervisors Meeting Minutes September 20, 2019 .....Tab 03
  - B. Consideration of Operations and Maintenance Expenditures September 2019.....Tab 04
  - C. Consideration of Operations and Maintenance Expenditures October 2019.....Tab 05
  - D. Consideration of Operations and Maintenance Expenditures November 2019.....Tab 06
  - E. Consideration of Operations and Maintenance Expenditures December 2019.....Tab 07
  - F. Review of Financial Statements Month Ending December 31, 2019 .....Tab 08
- 5. STAFF REPORTS**
  - A. District Counsel
  - B. District Engineer
  - C. District Manager .....Tab 09
    - i. Aquatics Report
    - ii. Community Inspection Report
- 6. SUPERVISOR REQUESTS**
- 7. ADJOURNMENT**

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

Sincerely,

Nicole Hicks  
District Manager

# Danita Lyn Alston

13911 Sage Thrasher Lane

Riverview, FL 33579

Ricoh cell: 215-284-1618, Personal cell: 813-391-1115

## Objective

To secure a position within the Ricoh organization where I can utilize my 20 years of knowledge and experience with Ricoh that will also give me the opportunity to learn and grow with the company.

## Summary of Qualifications

- ✓ Resourceful and expedient problem-solver.
- ✓ Excellent customer service/support skills.
- ✓ Knowledgeable of the implementation process and project coordination.
- ✓ Methodical, logical, goal and detail-oriented.
- ✓ Superior oral and written communication skills.
- ✓ Ability to work under pressure, meet deadlines.
- ✓ Skilled managing multiple projects and issues.

## Technical Qualifications

Experienced in the following products:

### *Operating Systems:*

- Windows

### *Communications:*

- MS Internet Explorer
- Lotus Notes

### *Applications:*

- MS Office
- MS Excel
- MS Power Point
- Oracle
- Microsoft Project
- Microsoft Visio
- RSource

## Professional Experience

**04/2014 – Present Ricoh USA, Inc., Riverview, FL**

### **Project Manager, US Project Management**

- Responsibility of all aspects of assigned projects over the entire project life
- Primary point of contact with the client for all project related activities
- Ensure project deliverables are in accordance to Statement of Work
- Coordinate activities of project personnel, including 3<sup>rd</sup> party resources, to ensure project progresses on schedule and within prescribed budget
- Escalation to appropriate cross-functional resources for project issue resolution
- High level Customer Service
- Leads Customer facing kick off meetings
- Leads Internal kick off meetings
- Conducts weekly conference calls with Ricoh team and customer with agenda provided
- Document meeting minutes weekly that goes to customer and Ricoh
- Document Project Status Reports weekly that goes to customer and Ricoh
- Create and deliver Solutions Delivery and Acceptance document to customer for signature
- Work closely with every warehouse around the country (Supply Chain and Transportation)
- Work closely with FOMs, FTSMs and technicians around the country
- Work closely with Training Managers and Technology Applications Specialists around the country

**11/2009 – 04/2014 Ricoh USA, Inc., Tampa, FL**

### **Business Analyst**

- Manage the queues in the Event Review Desk
- Review up to 130 SOWs a month (PS, ITS, LDS & Vendor SOWs)

- Communication via phone or email to all analysts
- Project Managed the start up of ITS roll out
- Main contact for all ITS questions and/or training
- Maintain a log of all work processed
- Utilizing the Clarity system to assign projects to analyst
- Manage of queue of up to 430 projects per month that need to be assigned
- Maintain the inbox with questions regarding issues with Clarity

**07/2007 – 11/2009      IKON Office Solutions, King Of Prussia, PA**

**Order Coordination Supervisor**

- Supervisor of six employees
- Responsible for employees timecards, vacation requests and reviews
- Maintain marketplace logs and distribute accordingly to upper management
- Maintain Open Order Report
- Maintain TEU Report
- Maintain Aging Trials
- Serve as backup for the CSL
- Serve as backup when employees are out in Order Coordination
- Point of contact for all Order Coordination questions
- Conduct weekly meetings to roll out pertinent information to Order Coordinators
- Keep close eye on the Web forms queue's
- Open communication with the CCC
- Open communication with the warehouse

**11/2006-07/2007      IKON Office Solutions, King Of Prussia, PA**

**Order Coordination Team Lead**

- Support Order Coordination department
- Maintain report of all open orders
- Project Managed the roll out of Web Forms
- Backup for Order Coordination supervisor

**6/2005-11/2006      IKON Office Solutions, King Of Prussia, PA**

**Order Coordination Specialist II**

- Validate and Process standard forms packages from department of sales
- Act as primary liaison between multiple departments within the company
- Process orders by entering them into the system, and extensive follow up to ensure timely and accurate delivery of equipment
- Maintain logs of revenue and gross profit

**6/1999 - 6/2005      IKON Management Services, Devon, PA**

**Site Manager – Prudential, Fox & Roach Devon, PA (6/2000 – 6/2005)**

**Site Manager – Agilent Technologies, Wilmington, DE (6/1999 - 6/2000)**

- Manage businesses solutions center.
- Managed a team of 6 employees.
- Train new employees on reprographics equipment operation.
- Develop service guidelines used in customer support effort.
- Manage internal mail center including metering and distribution.
- Provide consultative advice and guidance to internal clients in support of professional presentation and delivery of reports and memorandums.
- Proper utilization of resources in an effort to support client projects in the most cost effective manner.

**3/1994 – 6/1999**

**Pitney Bowes Management Svcs., Malvern, PA**

**Team Leader – The Vanguard Group**

- Designed and produced reprographic training manuals instrumental in the development of procedures enforced in over 20 on site business solutions centers.
- Managed a team of over 25 employees.
- Spearheaded Quality Improvement Team (QIT) initiative.
- Direct contribution to the improvement of on site workflows and procedures.
- Provided overviews, employee introductions and training to all new team members at the 23-site facility.
- Performed weekly audits of client billing records and inventory accuracy.
- Recorded and maintained volume figures and employee payroll.
- Project Managed one project that generated 1 million dollars in business every quarter.
- Coordinated production of client reports and memorandums with the appropriate vendors to ensure that the instructions for printing, binding, fulfillment and inventory were accurately communicated and carried out.

**Education**

**Bloomsburg University, Bloomsburg, PA**

**Bachelor Degree 1992 – Major – Early Childhood Development**

**References**

References provided upon request.

**David Bailey III**  
**11025 Little Blue Heron Riverview, Fl 33579**  
**813.421.5758**  
**Db31982@gmail.com**

## **Education**

**8/2005 Florida Agricultural & Mechanical University Tallahassee, FL**

- B.S. Economics
- Minor Electrical Engineering Technology

## **Work Experience**

**Broker**

**03/2013 – Present Real Property Experts Inc, Tampa, FL**

- Performs Tenant Representation duties regarding commercial leasing for Commercial/Retail, Industrial and Office property types.
- Negotiates Purchase contracts between buyers and sellers of healthcare/medical property types.
- Performs lease analysis to determine if a space met client's criteria.
- Negotiates lease renewals and extensions for commercial lease.
- Underwrite trade areas by analyzing demographics, psychographics and tapestry segments to determine if target revenue per square foot will be achieved.
- Proficient ARCGIS Online analysis tools.
- CCIM framework consisting of a Market Analysis, Financial Analysis, Political Analysis and Site Analysis to determine a "Go" or "No Go" decision for projects.
- Evaluates client's needs in order to determine the best location for their business.
- Manages the leasing cycle for shareholders for commercial/retail, office and industrial property types.
- Negotiates lease agreements for thirty to fifty thousand square feet per year.
- Performs lease audits, identifying inconsistencies between lease languages and operating expenses.
- Evaluates income producing properties to determine investment values for investors.

**Real Estate Specialist/Property Development Specialist**

**06/2012 – 12/2012 Agro-Trade America DBA OkeyDokey Grocery Markets, Tampa, FL**

- Prepares Market Development Plans by segmenting markets into smaller trade areas; ride areas and identifies a growth plan for each area that includes targeting parcels.
- Runs financial models (in coordination with operations management).
- Negotiates Purchase contracts with sellers and leases with Landlords.
- Works and collaborates with landowners, real estate brokers and developers, as well as city, county and state officials to obtain information about a potential or existing site.
- Prepares real estate proposals and contracts for management approval.
- Presented sites to committee for lease approval.
- Initiates and organizes real estate market tours for bulk leasing projects and periodic market reviews.
- Compiles site ride binders and market summaries.

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- Oversees due diligence, entitlement activity, beer and wine applications, escrow closings, including meeting with government officials and public hearings. Coordinates with engineers, attorneys and other consultants.
- Ensures compliance with requirements, policies and regulations.

**Tenant Representative/Business Intermediary**

**04/2011– 03/2013 Gulf Coast Commercial Real Estate/CII Gulf Coast, St. Petersburg FL**

- Commercial Brokerage, Business Brokerage and Real Estate Management with emphasis in Commercial/Retail/Medical/C-Store industries.
- Past clients include but are not limited to HCA West Florida, Cellular Sales, Inc. a licensed Verizon dealer, BP Petroleum, Giant Oil and ConsolidatedMD.
- Compiles site ride binders and market summaries.
- Performs business valuation for disposition purposes.
- Performs commercial real estate BPO's.
- Negotiates Purchase contracts with sellers and leases with Landlords.
- Negotiates lease renewals and extensions with landlords.
- Performs market rate audits.
- Performs lease audits, identifying inconsistencies between lease languages and operating expenses.
- Prepares real estate proposals and contracts for client approval.

**Tenant Representative**

**12/2008 – 04/2011 Pointline Commercial Real Estate, Tampa FL**

- Commercial Brokerage and Real Estate Management with emphasis in Commercial Office and Industrial properties.
- Past clients include but are not limited to Blackstone Medical, EE&G and PSS World Medical.
- Compiles site ride binders and market summaries.
- Negotiates lease renewals and extensions with landlords.
- Negotiates Purchase contracts with sellers and leases with Landlords.
- Minimizes operating expense pass throughs.
- Complete renovation/relocations with minimal disruption.
- Negotiates tenant improvement dollars.
- Reviews lease documents to protect clients from unfavorable language and terms.
- Performs market rate audits.
- Performs lease audit with an objective to identify inconsistencies between lease languages and operating expenses.

**Third Party Recruiter 1**

**1/2008 – 12/2008 KForce Professional Staffing, Tampa FL**

**Realtor**

**2/2006 – 5/2008 Zip Realty, Tampa FL**

**Account Executive**

**9/2005 – 2/2006 Konica Minolta Business Solutions, Tampa FL**

**Mortgage Broker**



**David Bailey III**  
**11025 Little Blue Heron Riverview, Fl 33579**  
**813.421.5758**  
**Db31982@gmail.com**

**4/2004 – 4/2006 The Hometown Mortgage Company, Tallahassee, FL**

**Realtor**

**8/2005 – 2/2006 Century21 Sunshine Realty Tampa, FL**

**Realtor**

**3/2004 – 8/2005 Century21 First Realty Tallahassee, FL**

### **Professional Accomplishments**

#### **Hillsborough County MPO Citizens Advisory Committee**

- MPO – Metropolitan Planning and Transportation Organization
- Appointed by Hillsborough County Commissioner Ken Hagan

#### **CCIM – Certified Commercial Investment Manager**

- Accepted into the CCIM Cultural Diversity Education Program
- Served on the CCIM West Chapter Board

#### **Tampa Bay Public Leadership Institute**

- Selected to participate in The Tampa Bay Public Leadership Institute
- The Tampa Bay Public Leadership Institute is an independent, no-cost and non-partisan program for professionals who want to explore the possibility of public leadership in the future and prepare now to serve with excellence

## EDWARD YOHANNA SALIB, D.O.

**Home Address** 11120 Purple Martin Blvd.  
Riverview, FL 33579

**Contact** (201) 232-2331  
edsalib@gmail.com

### EDUCATION

- Palm Beach Consortium for Graduate Medical Education Family Medicine Residency, Port St. Lucie, Florida
  - Diploma Received: June 2015
- New York College of Osteopathic Medicine, New York Institute of Technology, Old Westbury, New York
  - Diploma Received: May 2012
- New York Institute of Technology, Old Westbury, New York
  - Diploma Received: May 2009

### MEMBERSHIP & HONORARY/PROFESSIONAL SOCIETIES

- American Osteopathic Association • Florida Osteopathic Medical Association
- American College of Osteopathic Family Physicians

### CERTIFICATION/LICENSURE

- American Osteopathic Board of Family Medicine Certified 2015
- NPI # 1073867941
- FL OS 12655
- BLS exp. 06/2020

### WORK EXPERIENCE

- |                 |  |
|-----------------|--|
| 8/2018- Present | Bay Pines Veterans Association, Bradenton, FL <ul style="list-style-type: none"> <li>• Community Based Outpatient Patient Aligned Care Team Physician</li> </ul> |
| 11/2017-2/2018  | Tower Health, Reading, PA <ul style="list-style-type: none"> <li>• Hospitalist – Locum Tenens</li> </ul>   |
| 9/2017-11/2017  | MedExpress Urgent Care, Multiple Locations in FL <ul style="list-style-type: none"> <li>• Urgent Care Physician – Locum Tenens</li> </ul>                        |
| 9/2017- 7/2018  | CareNow Urgent Care, Multiple Locations in FL <ul style="list-style-type: none"> <li>• Urgent Care Physician – Locum Tenens</li> </ul>                           |
| 9/2017-12/2017  | CareSpot Urgent Care, Multiple Locations in FL <ul style="list-style-type: none"> <li>• Urgent Care Physician – Locum Tenens</li> </ul>                          |

Edward Y. Salib, D.O.

7/2017-8/2017	Elliot Hospital, Manchester, NH <ul style="list-style-type: none"> <li>Hospitalist – Locum Tenens</li> </ul>
06/2016-10/2016	St. Vincent Riverside, Jacksonville, FL <ul style="list-style-type: none"> <li>Hospitalist – Locum Tenens</li> </ul>
06/2016- 02/2017	Advanced Care Hospitalists: South Florida Baptist Hospital, Plant City, FL Brandon Regional Medical Center, Brandon, FL <ul style="list-style-type: none"> <li>Hospitalist</li> </ul>
01/2017-12/2018	St. Mary Florida Pediatric and Family Care, Palm Harbor, FL <ul style="list-style-type: none"> <li>Family Medicine Physician</li> </ul>
08/2015-05/2016	North Okaloosa Medical Center, Crestview, FL <ul style="list-style-type: none"> <li>Hospitalist</li> </ul>

## PUBLICATIONS

### Publication

- Sidki, A., Baryeva, D., Gandhi, R., George, S., Salib, E., Vettichira, J., & Gagna, C. Chromatin Immunoprecipitation Assay: Over Exposure of DNA to Formaldehyde – Part 1. NYIT Journal of Undergraduate Research & Creative Expression. 2009, Feb; p17-20. Pub Status: Published.

### Poster Presentations

- Jakeman, A., Uhde, M., Kappes, A., & Salib, E.. (May 2015). *Life-threatening Consequences of an Enlarged Uterus* Poster presented at: Florida Academy of Family Physicians Practicing Physician, Resident, and Student Member Scholarly Poster Presentation, Family Medicine Spring Forum; Orlando, FL.
- Jakeman, A., Uhde, M., Kappes, A., & Salib, E.. (May 2015). *Life-threatening Consequences of an Enlarged Uterus* Poster presented at: Palm Beach County End of Year Poster Competition hosted by Bethesda Memorial Hospital; Boynton Beach, FL.
- Salib, E. & Dawkins, G.. (December 2013). *Atypical Pneumonia* Poster presented at: 2013 CEME Student/Intern/Resident/Fellow Scientific Research Poster Competition held at Nova Southeastern University; Fort Lauderdale, FL.
- Salib, E. & Bigsby, G.. (June 2013). *Green Nail Syndrome* Poster presented at: Palm Beach Consortium for Graduate Medical Education Poster Symposium; West Palm Beach, FL.

## VOLUNTEER EXPERIENCE

11/2017	American Heart Association – 2017 Tampa Bay Heart Walk, Tampa, FL
12/2013	Toys for TOTS, Stuart, FL
05/2013	Women’s Health Fair, Volunteer Physician, Vero Beach, FL
03/2013	Walgreens Walk for Diabetes, Port St. Lucie, FL

## OTHER AWARDS/ACCOMPLISHMENTS

### Residency:

- 2014-2015, Organizer of Interview Committee for Incoming Family Practice Interns/Resident, St. Lucie Medical Center, FL
- 2012-2015, Member of Medical Quality Assurance Committee, St. Lucie Medical Center, FL

### Undergraduate:

- Accepted to and completed the 7-year combined BS/DO Degree through NYIT
- Cum Laude June 2009

## HOBBIES & INTERESTS

Weightlifting, Gardening, Fishing, Shooting, & Electronics

# GILBERT STUART

(803) 968-7643 • gilstuart@yahoo.com

## Operations Management

Experienced program operations manager overseeing teams of technical professional staff engaged in multiple projects to advance the goals and mission of the organization. Manage a range of initiatives and service levels to achieve strategic outcomes. Work with cross-functional teams and stakeholders to meet business needs ranging from IT service delivery to infrastructure improvement, facility management, and security.

- Build and manage high-performing teams, providing vision and motivation to meet program goals.
- Support a shared vision across the enterprise, building collaborative relationships throughout the organization.
- Lead the integration of systems, processes and workflows, achieving continuous process improvement.
- Develop KPI Dashboards to measure and improve accuracy, transparency and compliance.
- Evaluate and streamline core IT systems, replacing obsolete systems and applications.

## Skills

- IT Infrastructure Programs
- Disaster Recovery
- Information Technology / Systems
- Disaster Recovery
- Resource Management
- Logistics Management
- Current Top-Secret/SCI Clearance
- Enterprise-Wide Operations
- Program and Project Management
- Team Leadership
- Change Management/Process Improvement
- Strategic Planning
- Risk Mitigation
- Cost and Schedule Management
- Process Improvement
- Staff Training and Development
- Bilingual(Spanish)

## Work History

**Program Coordinator, 1/2018 to Present**

### JROTC Program

- Implemented program serving students and JROTC faculty.
- Manage JROTC calendar of activities and logistics for campus program operations.
- Resolve issues concerning program implementation and student participation.

**IT Program Manager, Senior Advisor, 10/2015 to 10/2017**

**U.S. Army – MacDill AFB, FL**

- Coordinated and provided day-to-day leadership to cross-functional teams and communicated status of program initiatives to leadership and stakeholders.
- Managed all aspects of implementation including allocation of resources, process improvement, development of project scope and schedules and cost control.
- Ensured that major projects were delivered on time, on budget and within scope.
- Led teams, assigned individual responsibilities, managed project dependencies and managed performance.
- Oversaw 180+ employees, ensuring understanding of situation awareness for Special Operations Forces Information Enterprise initiatives.
- Managed JWICS/ SIPRNET communications network supporting 1,300 deployed nodes in 90 countries.
- Tracked 400,000+ customer service issues and resolution.
- Directed teams in the operation of Computer network Defense, Satellite Operations, Campus and Mobility, Consolidated Service Desk, Data Center and Cyber Protection.
- Opened new Global Enterprise Operations Network Command Center, expanding operation from 44 to 183 personnel, replacing an outdated legacy system.
- Ensured that the new system met the standards and policies established by Defense Information Systems Agency.

**IT Operations Manager, 10/2014 to 09/2015**

**U.S. Army, Uijeongbu, South Korea**

- Developed, trained and led 110 team members in delivering computer desktop and telecommunications services to 11,000 customers, achieving a 97% reliability rate.
- Recognized for meeting organizational goals as recipient of Meritorious Service Medal.
- Installed, maintained, and operated a Wide Area Network across 5,427 square miles north of Seoul, Korea.
- Maintained \$46 million in assets including vehicles, facilities, weaponry and tools.

## **GILBERT STUART – Page 2**

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### **IT Operations Manager, 09/2013 to 09/2014**

#### **U.S. Army, Kuwait**

- Integrated 220 employees into functional, inter-supporting teams that installed, operated, maintained, repaired and defended 2 multimillion-dollar networks.
- Implemented policies, procedures and business practices that facilitated network availability and customer service to 5,000 local and remote customers. Provided training on the proper handling of COMSEC material and the safeguard sensitive equipment
- Established remote contingency site and personnel relocation plan; seamlessly failed-over network resources during disaster recovery exercises.

### **IT Operations Manager, 06/2011 to 09/2013**

#### **U.S. Army – Shaw AFB, SC**

- Integrated 220 employees into high-performing functional teams to operate, maintain and defend \$34.5 million networks, implementing policies and business practices to facilitate network availability to 5,000 local/remote customers.
- Set up a remote contingency site and personnel relocation plan as part of a seamless fail-over network during disaster recovery tabletop exercises.

### **Senior IT Consultant, 11/2010 to 05/2011**

#### **U.S. Army – Kabul, Afghanistan**

- Deployed to Kabul to enhance strategic communication capabilities for 17,000 coalition warfighters.
- Safeguarded 165 staff through 30 enemy artillery attacks and repaired communication infrastructure.
- Transitioned campus infrastructure from copper wire to fiber optic, improved data integrity and increased transmission rates by 600%.
- As the organizations Master Resiliency Trainer, I conducted training in order to give soldiers the best possible chance at survival and success before, after, and during their service.

### **Information Assurance Project Manager, 07/2008 to 11/2010**

#### **U.S. Army – Heidelberg, Germany**

- Developed enterprise policies and advised the Army's 26 most senior generals on best business practices to thwart cyber subversion, sabotage and espionage resulting in award of the Defense Meritorious Service Medal, the military's third highest honor.
- Increased professional certification of the Army's IT workforce by 59%
- Presented continuous progress reports to the Secretary of the Army, Army Chief of Staff and Army CIO.

### **Senior Advisor, 12/2005 to 06/2008**

#### **U.S. Army – Molesworth, United Kingdom**

- Enabled training of 50+ employees in administrative, security, operational and logistical support functions for Joint Military IT services in Molesworth, UK, Germany into wide area network, reducing equipment and overhead costs by \$500K per year.
- Staffed and oversaw direct-support team responsible for continuous communications requirements of the Supreme Allied Commander in Europe.

## **Education**

**B.S:** Information Technology Management, May 2012

**American Military University**

#### **US Army Training**

- **First Sergeant Course for Managers**
- **U.S. Army SHARP Certified Trainer**
- **Master Resilience Certified Trainer - University of Pennsylvania Applied Project Management Course**
- **U.S. Army Information Systems Operator/Analyst Advanced Leaders Course**
- **Equal Employment Officer (EO)**
- **COMSEC Certification**

# JERMAINE FORREST

Information Technology Professional

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(954) 999.9698 | Jermaine.Forrest@gmail.com | Tampa, FL

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Results driven Information Technology leader with 15+ years of hands-on experience scaling division while overseeing IT Operations, compliance, security, business continuity, vendor relations and operating best practices. Experienced with Microsoft technologies, VMware virtualization, and server administration. Adept at sustainability planning and implementing IT objectives and systems through an innovative and pragmatic approach to analyze complex business needs. Demonstrated success in leading cost control, process improvement initiatives, increasing productivity levels and delivering technology initiatives enhancing delivery of services for both internal and external clients. Exhibits strong leadership skills including team development, and the ability to work collaboratively across departments, proactively solve problems, build consensus among stakeholders and execute critical projects.

## CORE COMPETENCIES & TECHNOLOGY STRATEGY

Organizational Development	Policy & Program Development	Technology Planning & Integration	TCP/IP and WAN
Client Needs Assessment	Audit & Regulatory Compliance	Contract Administration & Negotiation	Cloud Computing
Training & Development	Data & Records Management	Virtual & Infrastructure Mgmt	Documentation
Effective Communication	Revenue Cycle Management	Service Level Agreements	EMR Systems
Process Improvement	Change & Risk Management	Business Analytics	Wireless Lan
Vendor Management	Budgeting & Cost Controls	Strategic Planning	Data Analysis
Relationship Building	Data Center Management	Team Building	Telecom
Rapid Deployments	Technology Integration	Customer Focus	Cisco
	Enterprise Architectures	Data Security	

## LEADERSHIP HIGHLIGHTS

- **Business Transformation**

Reduced errors by 10% and average order processing time by 40% by Identified new ticketing system for IT related incidents that gained 90%+ adoption rate within six months, while supporting more robust reporting capabilities for executive/internal IT teams

- **Technology Delivery**

Developed a centralized team and distribution workflow, resulting in 50% reduction in personnel costs, fewer errors, and 30% monthly reduction in PHI disposal fees through the selection and implementation of a redundant and scalable HIPAA-compliant fax server solution

- **Contract Negotiation**

Negotiated contract with an ISP boosting network speeds by 10 times; provided a fully-redundant fiber optic backbone and leveraged next generation security devices at an annual savings of \$65,000.

## **PROFESSIONAL EXPERIENCE**

### **Chief Technology Officer**

*Tampa Family Health Centers, Inc.*

**Tampa, FL 2018 – Present**

Has overall management responsibility and accountability for the IT Department with the goal of providing a highly reliable, stable, and responsive IT system. Collaborate with end-users and senior management to ensure the alignment of IT infrastructure and systems with company strategy and objectives. As the CTO I provide and is accountable for the leadership, vision, direction, development, and maintenance of multiple complex and high priority projects for the department that directly impact the systems and/or business strategies of the organization.

- Support the Mission, Vision, and Values of Tampa Family Health Centers.
- Responsible for providing vision, strategic planning and leadership while developing, maintaining and enhancing the organization's information technology and related systems.
- Communicates an IT vision and strategy across all levels of the organization and builds consensus around key initiatives and projects.
- Oversees a team of seven full-time personnel directly and 55 indirectly and develops and maintains an IT structure that supports the needs of the Health Center.
- Manage day-to-day operations of the entire IT infrastructure including corporate network, voice and data services.
- Establish a metrics-based IT operation with a focus on service orientation and continuous improvement.
- Provide the highest level of service delivery: system availability, security, response time, and problem recovery.
- Project management and implementation of key technical initiatives.
- Define, implement, and achieve benchmarks for the IT infrastructure.
- Collaboration with all levels of management and staff to maintain a positive, and productive IT environment.
- Develop custom reports from EMR as defined by senior management.
- Assist COO and CFO in annual IT budget preparation; assess current and anticipated business technology needs ranging from application solutions to infrastructure reliability and scalability, while making critical decisions regarding resource deployment and implementing strategic development solutions.
- Performs periodic review of internal/external network security protocols and user access rights to prevent unauthorized access to confidential files and systems.
- Perform updates and maintains policies and procedures regarding all aspects of IT; works collaboratively with Compliance Officer in implementing and maintaining all HIPAA rules, regulations, requirements, and guidelines.



**Director of Management Information Systems**  
***Broward Community & Family Health Centers, Inc.***  
**Hollywood, FL 2014 – 2018**

Responsible for the deployment, maintenance and operation of infrastructure related properties for BCFHC. Represents BCFHC on Health Choice Network's (HCN) MIS Committee, serves as BCFHC's MIS liaison with external partners i.e. laboratories, Pharmacies, and Dental practice and served as HIPAA Security Officer to ensure HIPAA compliance

- Develop MIS policies and procedures as needed and ensures they are followed by health center as well as guidelines established by MIS committee.
- Oversees MIS resource utilization is properly aligned with BCFHC established budget.
- Coordinates MIS training, onboarding, setup, access and network level reports when required.
- Conduct quarterly MIS needs assessments for current and future projects/programs, evaluates expenditures, identify with input from the Senior Management a resolution to potential budgetary problems.
- Ensures resolution of any organizational MIS issues including emergencies during and after hours as necessary.
- Developed a centralized team and distribution workflow, resulting in 50% reduction in personnel costs, fewer errors, and 30% monthly reduction in PHI disposal fees through the selection and implementation of a redundant and scalable HIPAA compliant fax server solution.
- Manages, supports, and develops custom reports as defined by Senior Management or administration staff and provides daily productivity and other managerial reports as needed.
- Develop Standard Operating Procedures for data collection, validation and presentation. Conducts data analysis to determine trends and formulate recommendations to Senior Management and responsible for setup of all data capturing tables and systems.
- Partners with Medical Director and Process Improvement Committee to ensure data is validated prior to presenting to internal staff and external agencies.
- Integral in the evaluation, acquisition, deployment and management of numerous business critical applications including but not limited to the electronic health record, analytical data packages, provider credentialing software, fixed asset management software, ITIL compliant help desk ticketing system, collaborations tools, cybersecurity tools, desktop management agents and payroll/talent management system(s).
- Reduced errors by 10% and average order processing time by 40% by Identified new ticketing system for IT related incidents that gained 90%+ adoption rate within six months, while supporting more robust reporting capabilities for executive/internal IT teams.
- Negotiated contract with an ISP boosting network speeds by 10 times; provided a fully-redundant fiber optic backbone and leveraged next generation security devices at an annual savings of \$65,000.

**Director of Management Information Systems**  
***ChildNet, Inc.***  
**Plantation, FL 2012 – 2014**

Responsible for oversight, development and implementation of ChildNet's short and long term information technology strategic plans and technical and professional growth of eight team members.

- Managed and administered the MIS department budget and oversaw ChildNet's Disaster Recovery Plan.
- Created strategic objectives for information security to meet the organization's business needs.
- Liaison between IT partners and organization to negotiate with vendors on specifications, pricing, licensing etc.
- Created, executed and maintained policies and procedures governing information technology and data security.
- Evaluated various technological challenges presented by users and developed standard solutions to promote efficiency.
- Identified and recommended system development to management to meet and ensure business and internal stakeholder's needs are met to increase productivity.
- Updated the technology infrastructure to meet the demands of the changing environment.
- Developed and implemented successful transition plan for the organization to expand into Palm Beach County.

### **Network Manager**

***ChildNet, Inc.***

**Plantation, FL 2009 – 2012**

Established and executed IT operational policies and procedures while managing ChildNet's networking infrastructure including Cisco routers, switches and firewalls and leading a staff of five.

- Managed two sites connected via AT&T Metro Ethernet between the main office and datacenter.
- Migrated to Cisco Unity Connection 9 and Call Manager 9 from Unity 6 and Call Manager 6.
- Successful installation and configuration of Windows Server 2003/2008, Windows Exchange server, McAfee Endpoint Encryption (DLP), Microsoft Office 365 implementation and migration Implementation of cloud strategy.
- Supported 600 plus client workstations running Windows XP, 7 and 8. Managed an environment of 55 virtual servers.
- Managed VMware environment with Infrastructure client while working with applicable workstation, ESXi server, and convertor.
- Created templates, VMware cloning, virtual machines.
- Provided Help Desk / End-User support for hardware, software and Windows operating systems. Removed viruses; installed hardware and software; repaired printer; managed data backups. Troubleshoot network performance issues and ensured timely resolution.
- Installed and configured SonicWALL NSA4500 firewall and SonicWALL EX7000 Aventail appliance.
- Installed new/ rebuilt existing servers and configured hardware, peripherals, services, settings, directories, storage, etc. in accordance with standards and project/operational requirements. Developed and maintained installation and configuration procedures.
- Researched and recommended applicable innovative, and automated approaches for system administration tasks
- Provided Tier III/other support per request from various constituencies.

### **Master of Science in Management Information Systems**

Nova Southeastern University, Ft. Lauderdale, FL

### **Leadership Strategies for Information Technology in Health Care**



# Michael Crandall

Riverview, Florida  
(813) 557 3812 | carndall44m@icloud.com

## PROFILE

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- Technical Sergeant in the United States Air Force.
- Assisted in designing airport runway and terminal procedure for rescue and recovery military aircraft in Bahamas after Hurricane Dorian.
- Graduate of Airman Leadership School and Non-Commissioned Officer Academy.
- Leading airmen for six years and counting.

## EXPERIENCE

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### United States Air Force

#### *Terminal Procedures Specialist*

*2019- Present*

- Assist FAA SME in the determination as to whether an equivalent level of safety is maintained to support Flight Procedures Standards waivers and letters of approval.
- Attend and/or participate in state aviation or airport conferences.
- Revise, review or amend instrument flight procedures, including application of facility performance limitations, the nature and extent of interference from physical obstructions, controlled airspace, and communications with respect to applicable Federal Aviation Administration regulations, standards and criteria.
- The NRA coordination and review process involves a wide range of aeronautical subjects. Evaluate the effect of proposed obstructions, altered or deactivated airports, NAVAID outages and revisions to controlled airspace as they affect instrument flight procedures. Take action to amend affected procedures, as required.
- Conduct in-depth programmatic analyses, prepare feasibility studies, and provide program advice.
- Perform conference reviews, audits, and evaluations.
- Use Microsoft Office Tool Suites or specific FAA propriety such as Terminal Area Route Generation Evaluation and Traffic Simulation (TARGETS), Automated Procedure Tracking System (APTS), Digital Terrain Elevation Model (DTED), Obstacle Authoritative Source (OAS) etc. for evaluating and tracking various programs.
- Evaluate and determine the need for waivers of standards for Air Traffic Services instrument flight procedures and waivers of standards for installation of air navigation and lighting facilities and other applications affecting the navigation of aircraft.
- Analyze budget submissions for electronic and visual landing aids; participates in the determination of funding requirements by providing practical advice and recommendations to the FAA concerning adequacy of budget estimates to accomplish assigned programs.
- Identify the requirement and arrange for appropriate surveys to be accomplished in support of NAVAID installation and flight procedure development.
- Maintain liaison with other FAA elements to keep abreast of developments that may affect the Congressional Programs.

- Provide support to the Aeronautical Information Services (AIS) Periodic IFP Review effort. The contractor will review airport IFPs as notified by AIS/Flight Procedures Team (FPT) as related to obstructions, facility performance, aeronautical data and criteria changes, etc., and review NOTAMS with recommended procedural or criteria changes.
- Use Microsoft Office Tool Suites or specific FAA propriety software programs such as Terminal Area Route Generation Evaluation and Traffic Simulation (TARGETS), Automated Procedure Tracking System (APTS), Digital Terrain Elevation Model (DTED), Obstacle Authoritative Source (OAS), etc. for evaluating and tracking various programs.

## **United States Air Force**

### ***Air Traffic Control Watch Supervisor, Tower***

2017- 2019

- Fully certified Watch Supervisor/Controller/Trainer/Evaluator at Tower facility (Local Control, Ground Control, and Flight Data).
- Was responsible for controlling/supervising air traffic in United States Air Forces in Europe's (USAFE's) busiest and most complex airlift airfield.
- Uses extensive knowledge of rules, laws, regulations, and procedures governing the movement of air traffic to provide service to aircraft.
- Made rapid and crucial decisions during periods of quick change in traffic flow to ensure separation in accordance with FAA rules and regulations.
- Provided instructions and assistance to in-flight emergencies to ensure safe and expeditious flow of traffic.
- Observed and reported airport advisories, hazardous weather information, and equipment outages. Supports operations for a C-130J squadron, LJ-35 squadron, in addition to numerous USAF and civilian contract airlift aircraft.
- Initiated, formulated, and issued clearance and control instructions by applying air traffic procedures.
- Conducted inter-facility coordination with two GCA positions and two German civilian air traffic facilities.
- Performed daily equipment checks to ensure equipment is working at optimal levels. Operates specialized equipment including Tower Display Workstation (TDW), Local Weather Network System (LWNS), Enhanced Terminal Voice Switch (ETVS), Touch Entry Display (TED), Digital Voice Recording System (DVRS), Digital Audio Legal System (DALR), Standard Terminal Automation Replacement System (STARS), Airfield Automation System (AFAS), Instrument Landing System (ILS), Tactical Air Navigation (TACAN), Global Positioning System (GPS), Radar Control Panel (RCP), Monitor Control Workstation (MCW), Air Traffic Control Simulation Equipment (ATCSE), and Air Traffic Control Light Guns.

## **United States Air Force**

### ***Air Traffic Control Watch Supervisor, GCA***

2016-2018

- Fully certified Watch Supervisor/Controller/Trainer at Ground Controlled Approach (GCA) facility (Arrival Control and Arrival Assist). Airspace includes Class E airspace along with active Special Use Airspace reserved for United States Army special air and ground operations.
- Used extensive knowledge of rules, laws, regulations, and procedures governing the movement of air traffic to provide RADAR service to aircraft.

- Made rapid and crucial decisions during periods of quick change in traffic flow to ensure separation in accordance with FAA rules and regulations.
- Provided instructions and assistance to in-flight emergencies to ensure safe and expeditious flow of traffic.
- Observed and reported airport advisories, hazardous weather information, and equipment outages. Supports operations for a C-130J squadron, LJ-35 squadron, in addition to numerous USAF and civilian contract airlift aircraft.
- Initiated, formulated, and issued clearance and control instructions by applying RADAR procedures.
- Conducted inter-facility coordination with three tower positions and two German civilian air traffic facilities.
- Performed daily equipment checks to ensure equipment is working at optimal levels.
- Operated specialized equipment including Local Weather Network System (LWNS), Enhanced Terminal Voice Switch (ETVS), Touch Entry Display (TED), Digital Voice Recording System (DVRS), Digital Audio Legal System (DALR), Standard Terminal Automation Replacement System (STARS), Airfield Automation System (AFAS), Instrument Landing System (ILS), Tactical Air Navigation (TACAN), Global Positioning System (GPS), Radar Control Panel (RCP), Monitor Control Workstation (MCW), and Air Traffic Control Simulation Equipment (ATCSE).

#### **United States Air Force**

##### ***Air Traffic Control Watch Supervisor, RAPCON***

2010-2016

- Fully certified Watch Supervisor/Approach Controller/Trainer/Evaluator at Radar Approach Control (RAPCON) facility (Approach Control, Approach Assist, Arrival Control, Clearance Delivery, and Coordinator positions).
- Responsible for controlling air traffic in complex Korean airspace encompassing 6,000 square miles with over 54,000 annual operations. Includes Class C and E airspaces and 15 special use/restricted areas.
- Used extensive knowledge of rules, laws, regulations, and procedures governing the movement of air traffic to provide RADAR and non-RADAR service to aircraft.
- Made rapid and crucial decisions during periods of quick change in traffic flow to ensure separation in accordance with Federal Aviation Administration (FAA) rules and regulations.
- Provided instructions and assistance to in-flight emergencies to ensure safe and expeditious flow of traffic.
- Observed and reported airport advisories, hazardous weather information, and equipment outages. Supported operations for three F-16 squadrons including one Republic of Korea (ROKAF) squadron.
- Controlled en route and terminal air traffic by use of both visual RADAR and non-RADAR means. Initiated, formulated, and issued clearance and control instructions by applying both RADAR and non-RADAR procedures.
- Conducted inter-facility coordination with four tower positions, three military Air Traffic Control agencies, and four civilian Korean Air Traffic Control agencies.
- Overcame intense language barrier between ROKAF and civilian aircraft/agencies.
- Performed daily equipment checks to ensure equipment was working at optimal levels.

- Operated specialized equipment including Local Weather Network System (LWNS), Enhanced Terminal Voice Switch (ETVS), Touch Entry Display (TED), Digital Voice Recording System (DVRS), Digital Audio Legal System (DALR), Flight Data Input/Output (FDIO), Standard Terminal Automation Replacement System (STARS), Airfield Automation System (AFAS), Instrument Landing System (ILS), Tactical Air Navigation (TACAN), Very High Frequency Omnidirectional Range (VOR), Global Positioning System (GPS), Remote Status Indicator (RSI), Remote Control Status Unit (RCSU), and Air Traffic Control Simulation Equipment (ATCSE).

## EDUCATION:

**Syracuse University**  
*Bachelors in Creative Leadership*

2019 – Present

**Community College of the Air Force**  
*Associate's in Air Traffic Operations and Management*

2018

## REFERENCES:

Name	Employer	Title	Phone	Email
James Bindert(*)	United States Air Force	Assistant Chief Controller, Tower	+49 01604179034	james.bindert@us.af.mil
Hubert Drake (*)	United States Air Force	Chief Controller, RAPCON	(405)887-0366	hubert.drake@us.af.mil
Ut Ta (*)	United States Air Force	Watch Supervisor, Tower	015162514066	ut.ta@us.af.mil
Daniel Triglianios (*)	United States Air Force	Watch Supervisor, RAPCON	(347)439-8215	dantrig@gmail.com

(\*) Indicates professional reference

**ADDITIONAL INFORMATION:**

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- 86th Operations Group Mission Support NCO of the Quarter: 4th Quarter 2017
- 86th Operations Support Squadron Mission Support NCO of the Quarter: 4th Quarter 2017
- Air Traffic Controller of the Year: Kunsan Air Base 2015
- Air Traffic Control Trainer of the Quarter: 2nd Quarter 2014
- Air Traffic Controller of the Quarter: 2nd Quarter 2013
- Air Force Commendation Medal with 1 device
- Korean Defense Service Medal
- Basic Military Training Graduate Ribbon
- National Defense Service Medal
- Global War on Terrorism Service Medal
- Good Conduct Service Medal with 2 devices
- Air Force Longevity Service Ribbon
- Non-Commissioned Officer Professional Military Education Graduate Ribbon with 1 device
- Outstanding Unit Award with 1 device
- Meritorious Unit Award with 1 device
- Small Arms Expert Marksmanship Ribbon
- Overseas Short Tour Ribbon
- Security Clearance (SECRET)



# MICHELLE J. LEBEAU-ELROD

## WORK HISTORY

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**March 2015-Current      Amazon flex, Insta-cart, Shipt**

I work for various delivery companies. Delivery groceries, pharmaceuticals, and Amazon deliveries.

**August 2008-March 2015      Customer service representative, West At Home**

Answer incoming calls in regards to their plans and assist with customers their accounts

**May 2013-December 2014      Data Collector, Retail Data (part-time position)**

Collect pricing and item data for various vendors and submit by scanner

**August 2013-September 2014      Aerotek, Temporary Agency**

Responsible for communicating with customers and vendors on a daily basis

Utilized computer systems on a regular basis and verified information

Entered data into word, excel and outlook on a regular basis to provide the best customer service

**October 2008-November 2011      Execution Team Representative, Home Depot**

Traveled to the different stores in the district and ensured that the integrity of the company was met by the vendor. Provide extensive customer service on a daily basis and maintained and cultivated relationships

**January 2003-September 2008      Office Manager, Morgan Electric**

Answer phone, post payroll, purchase orders, accounts payable and receivable. Order rental equipment for job sites and various others tasks to keep the office and team running smoothly.

## EDUCATION

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Diploma, William H Harrison High School, 1984

Associates Degree, Indiana Business College, 1987

## INTERESTS & ACTIVITIES

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Music, reading, photography, animal rescue

Make a wish, Honor Dog Rescue and National MS Foundation

## COMPUTER AND OTHER SKILLS

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Over 20 years computer experience, word, excel and outlook programs

15 years retail experience, cash register and other office machines

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# NATALIE JEAN-BAPTISTE

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14025 Tropical Kingbird Way, Riverview, FL 33579 | H: (813) 270-9293 | nataliej5@aol.com

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## Executive Profile

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Human Resources Manager with 18-year background in employee management and practical understanding of business needs. Areas of expertise include counseling, career development, policy interpretation and application; conflict management and employee training, employee management, hiring and benefits. Facilitator of Human Resource functions for service delivery staff, including onboarding, off boarding, annual reviews, performance improvement plans, bonuses, and training. Solutions-focused, versatile management professional offering a comprehensive background supporting U.S. military operations in roles of executive level Protocol and Logistics specialties, supporting over 20 Nations with 16 years of dedicated exceptional service. Subject matter expert of multiple human resource disciplines, including compensation practices, Excellent interpersonal skills with a demonstrated ability to provide guidance and assistance to all levels of employees, including managing a team.

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## Skill Highlights

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- Top Secret/SCI Security Clearance
  - Effective Team Building
  - HR Consultant and Manager
  - Protocol Specialist
  - Data Management
  - Strong Verbal Communication
  - Detail-oriented, organized, proactive and meets all deadlines
  - Human Resource Specialist
  - Manpower Planner and Project Review
  - Conflict Resolution & Mediation
  - Program and Project Management
  - Cultural Awareness & Diversity Expert
  - Event Planning for High-level Officials
  - Member Development & Retention
  - Accounts Payable/Receivable
  - Compensation/ Payroll Manager
  - Employee Relations
  - Recruiting & New Hire Orientation
  - Strong Microsoft office skills particularly in Word, Excel and PowerPoint
  - Public Speaking
  - Strong Oral and Written Communication
  - Operations Management
  - Provider Relation Specialist
  - Strategic Planning & Corporate Vision
  - Lieutenant, U.S. Navy Reserves
  - Payroll Specialist
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## Professional Experience

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### Deputy Training Branch Chief

07/2018 to Present

### Combined Security Transition Command - Afghanistan

- Deputy Training Branch Chief, responsible for the Security Assistance Office-Afghanistan, SAO-A, training for all Professional Military Education, PME, and Ground/Special Forces Schools. Work directly with all formal education and training facilities to coordinate training for the Afghan National Army, ANA, as well as the Ministries for Foreign Affairs, to include MOD, MOI, NSA, and IDLG
  - Work with Army War College, Command and General Staff College, and JSOU University; coordinate mobile training teams for Afghan military students
  - Enforce training standards, policies, and procedures; design Professional Military Education PME Program to achieve country and MOD objectives.
  - Direct supervisor for two Local Nationals and one U.S. NCO
  - Develop training plan to ensure max capacity of qualified Afghan students attend courses in the U.S.
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- Ensure all students are Leahy vetted prior to acceptance into program
- Coordinate directly with Consular Section, U.S. Embassy, Kabul, for visa processing
- Conduct English Comprehension Language, ECL, tests on all school candidates
- Coordinate all flights; conduct travel brief for all students prior to depart to the U.S. for specialized training
- Manage \$800k International Military Education and Training, IMET and \$80K Combating Terrorism Fellowship Program, CTFP funding

## **Protocol Officer**

**10/2003 to 07/2018**

### **United States Navy Assistant Navy Reserve United States Central Command**

- Manage over \$100K annually as the Official Representation Funds (ORF) Custodian. Ensure 100% accountability for ORF gift inventory valued over \$10K.
- Certified Protocol Officer; attended Protocol School in 2013 and 2016, USCENTCOM.
- Coordinates and execute Distinguished Visitor visits including foreign dignitaries, Chiefs of Defense, Ambassadors and General and Flag Officers.
- Plan, coordinate, and execute conferences in support of Combatant Command Missions. Brief Chief of Staff of all VIP visits, exercises, and event/conference progress, to include creating event/planning binders for stakeholders concerning events.
- Action Officer- Conducted needs assessments for command events, such as retirement, promotion, change of command, and public affairs events.
- Trained new civilian and military employees.
- Develop itineraries for all upcoming events.
- Worked with Command Flag Mess to prepare meal choices for General and Flag Officers and their VIP command guests.
- Scheduled transportation and lodging required for visitors to the command who participated in events. Coordinated security escorts for VIP guests.
- Arranged evening engagements with senior staff, to include exclusive/private dinners, group breakfast and lunch-and-learn events.
- Prepared and maintained files, reports, and financial records; oral reports to Chief of Staff (2-Star General of USCENTCOM) and other key leaders
- Established and maintained effective working relationships with other employees, event planners and general public.
- Executed services, to include security, production, audio visual, phones, sound and lighting.
- Developed/executed award recognition ceremonies for junior military service members. Executed change of command, retirement, and promotion ceremonies at the 4-Star level.
- Assisted with high level command visit of former president Barak Obama, and former SECDEF, Chuck Hagel.
- Travel with command staff to execute conferences and exercises in Qatar and D.C.

## **FRANCHISE SUPPORT SPECIALIST II/TRAINING**

### **Medi-Weightloss Clinics**

**03/2009 to 08/2010**

- Responsible for conducting pre-opening trainings for new clinic franchise owners and clinic staff.
- Obtain all legal documents from clinic owners prior to clinic opening, including: all medical licenses, CVs, malpractice licenses and operational licenses, applications, and legal documents required by law.
- Travel to various states to assist franchise owners with pre-opening and directed opening of individual clinics.
- Responsible for ensuring clinics are operational and in compliance per state and federal guidelines.
- Primary support for Franchise Field Consultants, assisting with corporate support of 32 clinics in 14 states.
- Manage monthly reports, revenue, clinic purchases, customer service and staff issues/improvement, and daily

operating procedures.

- Manage the development, calendar, registration, and coordination of all aspects of the "New Clinic" and Regional Training Programs.

**Human Resources Manager**

**OFFICE ADMINISTRATOR**

**04/1995 to 03/2009**

**Doctor's Walk-In Clinic**

- Oversee daily medical office operations managing a team of 36 professionals.
- Identified staff vacancies and recruited, interviewed and selected applicants. Hiring, training, and scheduling all patient representatives and cashiers for urgent care front office. Daily clinic balancing/month-end balancing/report processing for all clinical and administrative departments. Accounts payable and receivable for operational and medical supplies responsible for completing annual employee evaluations for all patient representatives and cashiers.
- Manpower specialist – assess and approve all medical staff evaluations, including medical assistances, lab techs, nurses, and x-ray technicians. Maintain, review, and process personnel records for 36 employees Payroll processing for front and back office staff Ordering and tracking clinic supplies for both front and back office Conducts quarterly staff meetings to ensure all departments are briefed with updated information concerning the clinic's productivity excellent customer service skills, responsible for ensuring quality medical care is provided to each patient.

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**Education**

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**Associates: Arts**

**May 3, 1999**

Hillsborough Community College

Tampa , FL , United States

**Bachelor's Degree: Business Management**

**June 30, 2007**

University of Phoenix

Tampa , FL , United States

**Master's Degree: Business Administration**

**June 17, 2013**

Strayer University

Tampa , FL , United States

## **QUALIFICATIONS SUMMARY**

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- ❖ Highly organized, creative & innovative leader with more than 15 years of community-based care system administration experience.
- ❖ Strong communicator who interacts respectfully and effectively with individuals across the spectrum of social and economic backgrounds and cultures.

## **PROFESSIONAL EXPERIENCE**

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### **Senior Director of Staff: Eckerd Community Alternatives - C13**

**2018- Present**

- Responsible for facilitating senior leadership meetings with case management providers to ensure systemic concerns are addressed to include performance on outcome metrics and changes related to lead agency support.
- Responsible for monitoring system of care capacity needs and recommending adjustments as needed to ensure there is sufficient system capacity (specifically front-line case managers) to address the growing demand for services.
- Responsible for supporting lead agency teams in all HR related functions to include the on-boarding process, staff development, HIPAA compliance, Safety and Security, and Staff Morale.
- Point of Contact for USF Training Consortium regarding system of care pre and in-service training needs.
- Responsible for the ongoing support of all administrative services functions to include Revenue Maximization, Data Services, Records Management, Background Screening, Office Management, and Diligent Search.

### **Senior Director of Support Services: Eckerd Community Alternatives - C13**

**2016-2018**

- Responsible for facilitating strategic leadership discussions with internal Lead Agency Senior Management Team and External Case Management Provider Agencies.
- Responsible for the direct oversight, supervision, and training of various lead agency divisions to include: Revenue Maximization, Data Services, Records Management, Background Screening, Office Management, and Diligent Search.
- Operated as the Lead Agency Point of Contact for establishing FSFN access.
- Serve as Chair of Lead Agency Safety Committee, Special Projects, Emergency Disaster Liaison, and Deaf or Hard of Hearing Liaison.
- Point of Contact for USF Training Consortium regarding system of care pre and in-service training needs.

### **Senior Director of Out-of-Care Care: Eckerd Community Alternatives - C6 and C13**

**2014-2016**

- Responsible for the oversight and management of the lead agency budgets in both judicial circuit 6 and 13.
- Responsible for working with the out-of-home care teams and stakeholders within both judicial circuits to identify strategies to safely reduce OHC spending for children in substitute care.
- Responsible for conducting data analysis to identify root causes of budget variances and working with various lead agency teams to address problematic areas accordingly.

### **Senior Director of Support Services: Eckerd Community Alternatives – C6**

**2008-2014**

- Responsible for the direct oversight, supervision, and training of various lead agency divisions to include: Revenue Maximization, Data Services, Records Management, Background Screening, Office Management, Diligent Search, Contracts, and Quality.
- Responsible for FSFN Adhoc reporting on an as needed basis by all lead agency teams.
- Point of Contact for USF Training Consortium regarding system of care pre and in-service training needs.

## **EDUCATION**

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M.B.A./TM, University of Phoenix, Phoenix, Arizona  
B.S., Professional Administration, Barry University, Miami Shores, FL  
Able to communicate effectively in Creole and Spanish

**Name**            **Tamia Roberts**  
**Email**            miaroberts526@gmail.com  
**Address**        11022 Little Blue Heron Dr.  
                      Riverview, FL 33579  
**Phone**           516-749-6637

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## **RESUME**

### **Objective**

Seeking a challenging position where I can utilize my educational and experience background of over twelve years, while doing what I have a passion to do. Leadership, team management/participation, attention to detail, timeliness, and others are just some of the skills I bring with me. Intricate knowledge of management for budgets, auditing, collections, and analyzing administration, both accounting and healthcare, are my strong suits and learning every day is top priority.

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### **Summary**

12+ years' experience in budget management, workforce-manning analysis, and healthcare administration.

Reports and provides insight for budget management, workforce-manning analysis, and healthcare administration methods. Works independently and leads teams of technicians and clerks in order to provide accurate, timely, and relevant result analyses to meet requirements. Has proven performance coordinating with internal and external team members organizing reports of analysis and administration from raw data, conducts performance measurements, reporting, tracking, and various techniques to improve accuracy and quality of work. Expertly skilled in managing large and complex data to interpret strategic objectives to meet needs of budget and administration.

### **Aligning Expertise**

Administration	Commitment to Employee/Supervisor Relationships
Human Resource Management	Policies/Procedures Development and Implementation
Critical Thinking	Problem Resolution

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### **Skill**

#### **Senior Level Skills**

Over twelve years' experience problem-solving, analytical skills, reporting, briefing, and presenting results internally and externally. Ability to handle multiple projects and stakeholders.

Commitment to excellence. Professional work ethics and results driven. Proven expertise in conflict resolution for individual and team relationships.

Maintains the quality of team research, output, reporting, and analyses. Collaborates with internal and external federal and civilian partners in a variety of advisory and resolutions in regards to the responsibilities for Human Resource duties.

### **Strategic Initiatives**

Understands future strategies and direction to anticipate needs. Develop metrics supporting quality initiatives. Develops end-user access processes. Situational analysis and audit of current processes, methodologies, and systems. Driving new solutions that may be implemented worldwide or as local processes.

### **Problem Solving**

Able to move from the abstract to the detailed, and from details to “big picture”. Able to recognize and investigate anomalies and propose solutions. Able to extract insights from management and budget analysis, which involves a level of analytical comprehension and manipulation. Ability to use business judgment to guide analysis, draw implications from the data, and synthesize into succinct and clear communications.

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### **Experience**

Public Utilities - Hillsborough County, 10/2018 – 7/ 2019

#### **Administrative Specialist 1 (Supervisor)**

**Administration.** Provided supervision, guidance, training, and review the work of (2)direct subordinate administrative/clerical and 60 indirect subordinate personnel and served as representative and liaison for Section Manager by disseminating directives, instructions, assignments and following-up on the status of time sensitive items within the department or agency. Independently performed a wide variety of paraprofessional administrative, secretarial and confidential functions and duties supporting a director or agency head. Managed and closely monitored Section Manager’s calendar; scheduled and coordinated appointments, conferences and itineraries; made travel and lodging arrangements; completed travel reimbursement documentation. Initiated and scheduled tentative appointments for director or agency head; reserved venue, coordinated attendees; assembled handout materials, slideshow presentations and equipment. Reviewed and analyzed outgoing correspondence for internal consistency and proper conformance with administrative policies, approvals and signatures, as well as formatted, grammatical construction and typographical errors. Initiated and composed agendas, minutes, correspondence, memos, spreadsheets, logs, invoices, and reports in final form, for approval or signature of director or agency head. Reconciled accounts and prepared trial balances and/or schedules.

**Training.** Provided and offered guidance to other Administrative Personnel, Industrial Electricians and Mechanics thorough training of County operating procedures, policies, and regulations.

Defense Logistic Agency, Norfolk, VA 05/2016 – 11/2017

**Document Automation Specialist/Accounting Technician**

**Accounting Technician.** Established and maintained control and subsidiary accounts for classes which are inter-related, require extensive supporting schedules and analyses, involve extensive subdivisions with intermediate summary ledgers, and require frequent and varied adjustments. Reviewed, analyzed, classified, and reconciled all transactions in relation to the commitment and obligation documents. Researched and resolved any and all discrepancies in accounting processes and paperwork. Reviewed and analyzed reports and listings identifying errors. Took corrective action to balance reports and listings, as well as verifies the corrected copies, ensures all transactions are properly processed and that total activity agrees with pre-determined control totals. Prepared accounts and adjusted them to reflect any outstanding balances. Reviewed unliquidated obligation and back-up files, performed liquidations when notified of receipt of goods/services. Reconciled accounts and prepared trial balances and/or schedules.

**Training.** Offered and provided guidance to other Accounting Technicians by conducting thorough training of operating procedures, policies, and regulations.

**Key Accomplishments.** Performed miscellaneous customer service communications and surveys in order to provide the practices had a responsive organizational interactions. Received Champion of Caring letter from the Director of Defense Logistics Agency for excellent customer service operations. Revamped workflow within the office that resulted in an increase in productivity, decrease in past due accounts and an increase in patient satisfaction.

Value Options, USCG, Chesapeake, VA 11/2015 - 05/2016

**Coast Guard Support Services Coordinator**

**Operations Management.** Established department procedures that met goals. Continually analyzed Department of Homeland Security operations, procedures and policies to achieve the highest efficiency and best practices. Held regular meetings to discuss operational information and procedure updates. Used Technical ability to Create and Maintain the Development of the CISM (Critical Incident Stress Management) peer registry database and the Work Life trainer's database for the Office of Work Life and the CG SUPRT Program. Identified locations where CISM trained peers and Work Life Trainers were needed and could be located. Developed and maintained Training Certifications for over 800 CISM Peers. Provided linkage and resources for



EAP (Employee Assistance Program) Services to an anticipated increased case load due to Sexual Assault and reduction in force initiatives in the Coast Guard. Managed and coordinated Work Life training request received from EAP-coordinators within the Coast Guard, Veterans Affairs Prepared, validated and streamlined all CG Suprt data to ensure all quarterly reports were complete and accurate for submission to the United States Coast Guard Employee Assistance Program Coordinator and Work-Life Division Chief. Conducted and complied over 2000 Surveys of CG Suprt customers/clients which generated their opinions of the CG Suprt program. Accomplished a variety of staff studies and reports concerning Directorate support effectiveness and efficiency to provide data required in current and future plans and operations and in response to requirements imposed by higher headquarters. Reviewed and evaluated responses from various Directorate divisions prior to review or signature by the Deputy for adequacy, clarity, and completeness of reply. Participate with the FAP staff in the development and implementation of outreach/prevention, resource and referral, and treatment programs for individuals, families, and groups needing assistance with family problems and issues. Participated in the development of action plans for the Family Advocacy Outreach Prevention Team. Marketed a wide range of secondary prevention programs to first sergeants, commanders, and other base officials Plans support activities for groups, such as spouses of deployed military members. Performed a wide variety of office management duties. Assumed duties as the principle administrative support specialists for the Coast Guard EAP Program. Provided advice to military and civilian managers and supervisors concerning processes and procedures necessary to accomplish various military and civilian personnel objectives. Analyzed data in command database to identify, document and correct discrepancies while accessing and inputting data. Developed ad hoc queries to extract specific information for command users. Formed alliances with staff and Fleet Commanders and reports issues, communicates policies, and provide sound alternatives ensuring policy and procedural compliance. Provided training and guidance to less experienced Readiness Analysts. Analyzed and evaluated the effectiveness of program operations and resource partner activity in meeting the goals and objectives of the assigned office. Established and maintained meaningful working relationships with key contacts of other Federal and branches of the military, to collaboratively provide the needed programs and services to small businesses in the area

US Navy/ Naval Medical Center, Portsmouth, VA 07/2006 - 12/2015

### **Hospital Corpsman**

**Healthcare Administration.** Collaborated, communicated, set priorities, and organized the work to meet deadlines. Ensured compliance with established processes, policies, and regulations. Communicated effectively, both orally and in writing, to meet program objectives and with a diverse group of individuals to include healthcare professionals and paraprofessional personnel. Facilitated numerous teleconferences, which provided critical communication regarding changes in policy; directly enhanced the proficiency of 120 personnel. Knowledge of health administration and managed health care programs and practices, as well as general clinical

principles and practices as they relate to a military medical environment. Knowledge of military commands goals and objectives, the sequence and timing of key operational events and milestones, and methods of evaluating the effectiveness of planning actions related to actual events; and the relationship of the various command entities. Maintained and wrote all policies and procedures that pertained to the medical department while serving onboard the USS Carl Vinson. Knowledge of policies and procedures associated with operational activities that affected the patient flow, patient care and the revenue process. Strong collaborations between regional commands, Bureau of Medicine and Surgery's office of reserve affairs, and commander, Naval Reserve Forces directly resulted in enhanced communication flow, optimal mission capability, and increased deployment readiness.

**Budget Management.** Maintained a \$1M budget and compliance guidelines for the US Navy medical personnel. Analyzed and forecasted labor cost estimates. Assessed projects feasibility and cost effectiveness, as well as conduct after action reviews. Identified and resolved budget issues and developed cost-cutting solutions to ensure budget adherence. Created and maintained Microsoft Excel spreadsheets for deployment readiness for Naval medical personnel in accordance with Bureau of Navy Medicine. Gathered, assembled, and analyzed facts, conducted analysis, revised recommended solutions, and developed briefings, papers, and/or reports suitable for senior leadership use and decision making; developed presentations and gathered required data and preparing related reports. Maintained a \$200K supply budget and ensured the clinic had all equipment and supplies needed to effectively treat patients while serving at the Training Basic School medical clinic. Created routine purchase order requisitions and tracked purchase orders to ensure materials and services were delivered as requested. Reviewed requested and entered information; researched missing or incorrect information. Provided end users with feedback to ensure on-time delivery of materials. Resolved error rate associated with inaccurate purchase requests. Skilled in developing budget forecasts, cost projections, financial exhibits, unfunded requirements justifications, POM narratives, and offsets and disconnects, reclaims, issue papers, white papers and manpower management

**Program and Management Analyst.** Maintained and matched the appropriate personnel with the appropriate manning requirements based on their skill set. Analyzed workforce shortages with efficient distribution of personnel; provided critical manning support to 19 medical treatment facilities during the government shutdown. Governed 4,500 personnel in the medical reserve; ensured annual training was properly conducted.

**Clinical and Customer Service.** Knowledgeable of clinic management and advanced knowledge of medical terminology. Knowledge of the technical health care process as it relates to access to care. Provided emergency support to the victims affected by the earthquake in Haiti. Skilled in medication administration and conducted laboratory test and procedures. Assisted

healthcare providers with treatment and medical procedures; counseled patients regarding treatment plans. Conducted monthly equipment maintenance and inventory  
Successfully audited 500 medical records to ensure government compliance. Knowledgeable of medical record procedures and regulations to include administration, filing, researching, handling, securing in accordance with military regulations and policies. Knowledge of medical-legal issues sufficient to accomplish medical-legal risk management review of medical records.

**Key Accomplishments.** As Combined Federal Campaign (CFC) Coordinator, ensured 100% contact with all military personnel and raised \$7,092 which greatly exceeded the command goal of \$3,500 and ensured that over 30 charitable organizations received the necessary monetary support needed to fulfill their mission. Awarded the Navy Marine Corps Achievement Medal (NAM) for superior performance as Operational Support Office Administrative Assistant. Coordinated 23,286 days of critical manning for 25 medical treatment facilities.

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## **Education**

University of Maryland University, Adelphi, MD  
Bachelor of Science Degree 2017  
Major: Healthcare Management

Saint Leo University, Tampa, FL  
Master of Business Administration Degree Est. 2020  
Project Management

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## **Other**

### **Job Related Training**

Computer Related Microsoft Products (MSOffice Pro Suites) Access, Windows-based, iOS, and Mac Operating Systems, SharePoint, System Backup and Security Settings in Microsoft Windows and Mac OS Platforms. R-Care, Commonwealth of VA Notary Public exp. 2019, Basic Life Support- Provider (BLS), Armed Forces Health Longitudinal Technology Application (AHLTA), Health Insurance Portability and Accountability Act of 1996 (HIPAA), Computerized Patient Record System (CPRS)  
Typing speed greater than 45wpm.  
Federal Acquisition Regulation Training (2016)

## **References**

Provided upon request.

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**From:** James Graham <jngraham37@gmail.com>  
**Sent:** Monday, January 6, 2020 7:12 PM  
**To:** Nicole Hicks <nicole.hicks@merituscorp.com>  
**Subject:** CDD Open Board Seats

Dear Nicole,

My name is Lula Graham. I am interested in becoming a member of the Oaks at Shady Creek CDD board. I believe that my business and previous community experience will enable me to contribute to the goals of the CDD to benefit the Oaks at Shady Creek community.

I am unable to access my CV/Resume due to computer issues. However, I have highlighted my experience below.

Lula Graham  
10802 Great Cormorant Drive  
Riverview, FL 33579  
Home: 813-374-7393

Macy's Inc. - December 2001 - Present  
Sr. Manager Disability/Leave Management  
Responsible for Macy's enterprise compliance to Americans with Disabilities Act, as amended.

Cincinnati Chapter of The MOLES, Inc.  
Vice President - 2016 - 2018  
National social organization of women

Partners Against Domestic Violence Board - 2006 - 2009  
Atlanta, Georgia

Thank you for your consideration. I look forward to the opportunity to serve the community.

Sincerely,  
Lula Graham

Robin M. Lush

14073 Tropical Kingbird Way, Riverview, FL 33579

**Personal Background:**

My husband, Paul and I grew up in Massachusetts. Paul served 20 years in the Air Force and I was a 19 year Military Spouse. For the past 16+ years Paul and I have worked for the same company. After living in Massachusetts for the past 17 years we decided to move to Florida.

**Experience:**

I do not have any CDD experience but I have plenty of Community and Team Experience. Living in Military Housing it is pretty much like living in a Community Development. We had rules about maintaining our home and grounds. We all had to live by these rules but did not have any say in making the rules. We all understood the reasoning for the rules to keep the housing area nice for everyone.

Our children went to a community school. I was involved in many different groups to help support our children, the civilian community and our military families. I was very active in the PTA, Girl Scouts, Volunteer Crossing Guard and Safety Committee.

In the past 16+ years I have volunteered for many different groups at work include Team Moral, Office Events and Safety Committee. There is one position I did not volunteer for but just became... Team Mom. I know it may sound funny but I do wear this title with Pride. I was given the title from my co-workers, for being a kind, helping and caring person. My co-workers from the newest to the top executives have come to me for help. It's not that I am a "know it all" but it's because I am willing to help everyone. I will work with people to find their answer/resolve their issue. Most importantly, if I don't know how to help, I have no problem reaching out to people who may be able to help.

**Comments about the Candidacy:**

Honestly, I have no knowledge about CDD until we came to Florida. I would like to be on the Board to learn and help others learn about the CDD.

We are a Community and as a Community we need to maintain a balance to make and keep our Community great.

I am a straightforward, honest and caring person who wants to help our Community.

Thank You,

Robin M. Lush

January 9, 2020



# TIM WERSINGER

10925 Purple Martin Blvd, Riverview, FL 33579  
407.416.5108 · [timwersinger@yahoo.com](mailto:timwersinger@yahoo.com)



## OBJECTIVE

As a sixth generation Floridian, I truly care about this state and our community. My family and I had a home built in the Oaks at Shady Creek a little over two years ago. My wife and I are fortunate enough to work from home and our three daughters are enrolled into a charter school in the area. We embody living, working, and learning here, and are fully committed to making this the best community possible. I would like to take the passion that I have for this neighborhood, couple it with my diverse background of life and professional experiences, and serve on The Oaks at Shady Creek CDD Board of Directors.

## EXPERIENCE

### JANUARY 2019 – PRESENT

#### **TECHNICAL ACCOUNT MANAGER**, MICROSOFT

Provides white glove service and support to some of Microsoft's top strategic accounts and ensures that any necessary technical resources are highly available during mission critical and sometimes chaotic circumstances

### FEBRUARY 2016 – JANUARY 2019

#### **BUSINESS SALES SPECIALIST**, MICROSOFT

A primary focus on customer obsession, creating fans, and growing a book of SMB/EDU business through the value proposition of the Microsoft Store

### SEPTEMBER 2014 – FEBRUARY 2016

#### **GENERAL SALES MANAGER**, INFINITECH IT SERVICES

Responsible for the day-to-day sales operations of a start-up Managed Information Technology Services Provider

### APRIL 2013 – SEPTEMBER 2014

#### **MAJOR ACCOUNT EXECUTIVE**, SAXON BUSINESS SYSTEMS, A XEROX COMPANY

Responsible for selling Managed Print Services & Xerox multi-functional devices to organizations with a minimum of 1,000 employees in the Orlando market

### NOVEMBER 2009 – APRIL 2013

#### **ACCOUNT MANAGER**, COPYTRONICS INFORMATION SYSTEMS, A KONICA MINOLTA COMPANY

Supporting sales and service in the following areas: (1) Konica Minolta and Lexmark multi-functional devices (2) Managed Print Services (3) Managed IT Services

### FEBRUARY 2004 – AUGUST 2009

#### **MARKETING MANAGER**, ADVANCED DOCUMENT SOLUTIONS

Responsible for the success of a team in generating new business leads for the outside sales department through telemarketing and email campaigns

## BOARD EXPERIENCE

- Served on Board of Directors for Computer Mentors Group from January 2017 through January 2019
- Serves as Vice President of Board of Directors for The Oaks at Shady Creek HOA as of November 2019

**RESOLUTION 2020-01**

**A RESOLUTION OF THE BOARD OF SUPERVISORS  
DESIGNATING THE OFFICERS OF THE OAKS AT  
SHADY CREEK COMMUNITY DEVELOPMENT  
DISTRICT, AND PROVIDING FOR AN EFFECTIVE DATE.**

**WHEREAS**, The Oaks at Shady Creek Community Development District (the “District”), is a local unit of special-purpose government created and existing pursuant to Chapter 190, Florida Statutes, being situated entirely within the County of Hillsborough; and

**WHEREAS**, the initial supervisors have taken and subscribed to the oath of office per F.S. 190.006(4); and

**WHEREAS**, the Board of Supervisors (hereinafter the “Board”) now desires to organize by designating the Officers of the District per F.S. 190.006(6).

**NOW, THEREFORE, BE IT RESOLVED BY THE BOARD  
OF SUPERVISORS OF THE OAKS AT SHADY CREEK  
COMMUNITY DEVELOPMENT DISTRICT:**

1. The following persons are elected to the offices shown, to wit:

_____	Chairman
_____	Vice-Chairman
<u>Brian Lamb</u>	Secretary
<u>Eric Davidson</u>	Treasurer
<u>Nicole Hicks</u>	Assistant Secretary
_____	Assistant Secretary
_____	Assistant Secretary
_____	Assistant Secretary

2. This Resolution shall become effective immediately upon its adoption.

**PASSED AND ADOPTED THIS 17<sup>th</sup> DAY OF JANUARY, 2020.**

**ATTEST:**

**THE OAKS AT SHADY CREEK  
COMMUNITY DEVELOPMENT  
DISTRICT**

\_\_\_\_\_  
Secretary / Assistant Secretary

\_\_\_\_\_  
Chairman

# THE OAKS AT SHADY CREEK COMMUNITY DEVELOPMENT DISTRICT

September 20, 2019 Minutes of Regular Meeting

## Minutes of the Regular Meeting

The Regular Meeting of The Oaks at Shady Creek Community Development District was held on **Friday, September 20, 2019 at 10:00 a.m.** at the Offices of Lennar Homes, located at 4600 W. Cypress Street, Suite 200, Tampa, Florida 33607.

### 1. CALL TO ORDER/ROLL CALL

Nicole Hicks called the Regular Meeting of The Oaks at Shady Creek Community Development District to order on **Friday, September 20, 2019 at 10:00 a.m.**

#### Board Members Present and Constituting a Quorum at the onset of the meeting:

Laura Coffey	Vice Chair
Paulo Beckert	Supervisor
Danny Schoonover	Supervisor
Gill Hammond	Supervisor

#### Staff Members Present:

Nicole Hicks	Meritus
Brian Lamb	Meritus
John Vericker	Straley Robin Vericker

There were no audience members in attendance.

### 2. PUBLIC COMMENT ON AGENDA ITEMS

There were no audience comments on agenda items.

### 3. BUSINESS ITEMS

#### A. Discussion on ADA Site Proposals

Ms. Hicks went through the proposals and what is included and excluded from each one. The Board discussed the proposals and what is required.

MOTION TO:	Approve the ADA Site Compliance proposal.
MADE BY:	Supervisor Hammond
SECONDED BY:	Supervisor Coffey
DISCUSSION:	None further
RESULT:	Called to Vote: Motion PASSED
	4/0 - Motion passed unanimously



**B. Discussion on Entrance Monument Electric Proposals**

The Board discussed the proposals and what is needed for the installation

MOTION TO:	Approval the proposal from Don Harrison Enterprise.
MADE BY:	Supervisor Hammond
SECONDED BY:	Supervisor Schoonover
DISCUSSION:	None further
RESULT:	Called to Vote: Motion PASSED
	4/0 - Motion passed unanimously

**C. Discussion on Entrance Monument Painting Proposals**

The Board discussed the proposal. Supervisor Hammond said he thought the proposal was high for the amount of stucco that needs to be painted. The Board agreed

MOTION TO:	Allow Supervisor Hammond to work with management to approval a new proposal with a do-not-exceed amount of \$1,500.
MADE BY:	Supervisor Coffey
SECONDED BY:	Supervisor Hammond
DISCUSSION:	None further
RESULT:	Called to Vote: Motion PASSED
	4/0 - Motion passed unanimously

**D. Discussion on Entrance Monument Pressure Washing Proposals**

The Board discussed the proposals and decided that any vendor who paints the monuments will include pressure washing, so separate pressure washing proposals are not needed.

**E. General Matters of the District**

**4. CONSENT AGENDA**

**A. Consideration of Board of Supervisors Meeting Minutes August 16, 2019**

The Board reviewed the meeting minutes. Supervisor Hammond said the July minutes are not on the website yet. Ms. Hicks said she will look into it.

MOTION TO:	Approve the August 16, 2019 minutes.
MADE BY:	Supervisor Coffey
SECONDED BY:	Supervisor Hammond
DISCUSSION:	None Further
RESULT:	Called to Vote: Motion PASSED
	4/0 – Motion Passed Unanimously

#### **B. Consideration of Operations and Maintenance Expenditures August 2019**

The Board reviewed the August 2019 O&Ms.

MOTION TO:	Approve the August 2019 O&Ms.
MADE BY:	Supervisor Coffey
SECONDED BY:	Supervisor Schoonover
DISCUSSION:	None Further
RESULT:	Called to Vote: Motion PASSED
	4/0 – Motion Passed Unanimously

#### **C. Review of Financial Statements Month Ending August 31, 2019**

The financials were reviewed and accepted.

### **5. STAFF REPORTS**

#### **A. District Counsel**

#### **B. District Engineer**

Ms. Hicks provided an update from the District Engineer regarding the request to have him check the area that is holding water. Supervisor Hammond and Supervisor Schoonover said there is always water in this area. Supervisor Hammond will provide an address.

#### **C. District Manager**

##### **i. Aquatics Report**

##### **ii. Community Inspection Report**

Ms. Hicks went over the management reports with the Board. Ms. Hicks asked Supervisor Beckert if he received the email from Mr. Roberts about the irrigation system having low pressure since the installation of the new landscaping at the entrance. Supervisor Beckert will look into it.

**6. SUPERVISOR REQUESTS AND AUDIENCE COMMENTS**

Supervisor Hammond asked if the meeting location can be moved in the future to be closer to the community.

**7. ADJOURNMENT**

Supervisor Coffey and Supervisor Beckert left the meeting. The meeting became a workshop to continue discussing District business.

DRAFT

*\*Please note the entire meeting is available on disc.*

*\*These minutes were done in a summary format.*

*\*Each person who decides to appeal any decision made by the Board with respect to any matter considered at the meeting is advised that 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.*

**Meeting minutes were approved at a meeting by vote of the Board of Supervisors at a publicly noticed meeting held on \_\_\_\_\_.**

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Printed Name**

**Title:**

☐ **Chair**

☐ **Vice Chair**

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Printed Name**

**Title:**

☐ **Secretary**

☐ **Assistant Secretary**

*Recorded by Records Administrator*

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Date*



Official District Seal

## The Oaks at Shady Creek Community Development District Summary of Operations and Maintenance Invoices

Vendor	Invoice/Account Number	Amount	Vendor Total	Comments/Description
<b>Monthly Contract</b>				
Aquatic Systems, Inc.	455549	\$ 298.00		Lake and Wetland Services - September
Landcare Landscaping, Inc.	1262766	4,721.00		Ground Maintenance - September
Meritus Districts	9281	2,817.23		Management Services - September
<b>Monthly Contract Sub-Total</b>		<b>\$ 7,836.23</b>		
<b>Variable Contract</b>				
Straley Robin Vericker	17401	\$ 1,032.90		Professional Services - thru 08/15/2019
<b>Variable Contract Sub-Total</b>		<b>\$ 1,032.90</b>		
<b>Utilities</b>				
Tampa Electric	211005987436 092019	\$ 20.11		Electric Services - thru 09/17/2019
Tampa Electric	211005987634 092019	3,486.22	<b>\$ 3,506.33</b>	Electric Services - thru 09/16/2019
<b>Utilities Sub-Total</b>		<b>\$ 3,506.33</b>		
<b>Regular Services</b>				
<b>Regular Services Sub-Total</b>		<b>\$ 0.00</b>		
<b>Additional Services</b>				
Field Stone	24026	\$ 300.15		Palm Tree Injection - 04/16/2019
<b>Additional Services Sub-Total</b>		<b>\$ 300.15</b>		
<b>TOTAL:</b>		<b>\$ 12,675.61</b>		

Approved (with any necessary revisions noted):

# The Oaks at Shady Creek Community Development District Summary of Operations and Maintenance Invoices

Vendor	Invoice/Account Number	Amount	Vendor Total	Comments/Description
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Signature

Printed Name

**Title (check one):**

☐ Chairman ☐ Vice Chairman ☐ Assistant Secretary

**Aquatic Systems, Inc.,**  
**a SOLitude Lake Management Company**  
Lake & Wetland Management Services  
2100 NW 33<sup>rd</sup> Street Pompano Beach, FL 33069  
800-432-4302

# Invoice

INVOICE DATE: 9/1/2019  
INVOICE NUMBER: 0000455549  
CUSTOMER NUMBER: 0060790  
PO NUMBER:  
PAYMENT TERMS: Net 30

Oaks @ Shady Crk CDD  
C/O Meritus  
2005 Pan AM Circle Suite 300  
Tampa, FL 33607

Received  
SEP 03 2019

QTY ORD	ITEM DESCRIPTION	U/M	UNIT PRICE	EXT PRICE
1	Monthly Lake and Wetland Services - September		298.00	298.00

WLD 53900  
4307

SALES TAX: (0.0%) \$0.00  
LESS PAYMENT: \$0.00  
TOTAL DUE: \$298.00

**A 1.5% FINANCE CHARGE IS ADDED TO BALANCES 31 OR MORE DAYS PAST DUE**

PLEASE RETURN THIS PORTION WITH PAYMENT.  
MAKE CHECKS PAYABLE TO: **Aquatic Systems, Inc.**

- ☐ Address Changes (Note on Back of this Slip)  
\*Please include contact name and phone number\*

DATE: 9/1/2019  
INVOICE NUMBER: 0000455549  
CUSTOMER NUMBER: 0060790  
TOTAL AMOUNT DUE: \$298.00

Aquatic Systems, Inc., a Solitude Lake  
Management Company  
2100 NW 33rd Street  
Pompano Beach, FL 33069

AMOUNT PAID:

**THANK YOU FOR YOUR BUSINESS!**



LANDCARE LANDSCAPING, INC.  
6767 S. LOIS AVENUE  
TAMPA, FL 33616  
813.676.6000 OFFICE  
813.837.1426 FAX

# Invoice

Invoice #

1262766

Date

9/1/2019

Bill To

OAKS AT SHADY CREEK CDD  
C/O MERITUS CORP.  
2005 PAN AM CIRCLE SUITE 300  
TAMPA, FL 33607

P.O. Number	Project	Terms
	OAKS AT SHADY CREEK CDD MAINTENANCE	NET 30
Quantity	Description	Amount
	RE: OAKS AT SHADY CREEK CCD	
	GROUND MAINTENANCE FOR THE MONTH OF SEPTEMBER 2019 CCD ONLY, PONDS, FRONT ENTRY AND ALL COMMON AREAS.	4,721.00
	LANDCARE APPRECIATES YOUR BUSINESS	
	Landcare Landscaping offers electronic invoices if you would prefer over paper mailed invoices. Please contact our office at <a href="mailto:accountingdept@landcare1.com">accountingdept@landcare1.com</a> if you would like to make this change to receive your invoices electronically.	0.00
<div>Should it become necessary for either party incident to this contract to institute legal actions for enforcement of any provisions of this contract, the prevailing party shall be entitled to all court costs and attorney's fees incident to such legal actions.</div> <div><b>Total</b> \$4,721.00</div> <div>A 1.5% LATE FEE WILL BE APPLIED AFTER 30 DAYS OF NON PAYMENT.</div>		

Received  
SEP 03 2019

53900 46004

W



2005 Pan Am Circle  
Suite 300  
Tampa, FL 33607

Voice: 813-397-5121  
Fax: 813-873-7070

# INVOICE

Invoice Number: 9281  
Invoice Date: Sep 1, 2019  
Page: 1

<b>Bill To:</b>
Oaks at Shady Creek CDD 2005 Pan Am Circle Suite 300 Tampa, FL 33607

Ship to:	

Customer ID	Customer PO	Payment Terms	
Oaks at Shady Creek		Net Due	
	Shipping Method	Ship Date	Due Date
	Best Way		9/1/19

[illegible]

Subtotal	2,817.23
Sales Tax	
Total Invoice Amount	2,817.23
Payment/Credit Applied	
<b>TOTAL</b>	<b>2,817.23</b>

# Straley Robin Vericker

1510 W. Cleveland Street

Tampa, FL 33606

Telephone (813) 223-9400 \* Facsimile (813) 223-5043

Federal Tax Id. - 20-1778458

The Oaks at Shady Creek CDD  
c/o Meritus Districts  
2005 PAN AM CIRCLE, SUITE 300  
Tampa, FL 33607

August 26, 2019

Client: 001450

Matter: 000001

Invoice #: 17401

Page: 1

RE: General

For Professional Services Rendered Through August 15, 2019

## SERVICES

Date	Person	Description of Services	Hours	
7/16/2019	VKB	REVIEW AND REPLY TO EMAIL FROM N. HICKS RE: UPCOMING BOARD MEETING AND POTENTIAL APPOINTMENT OF SUPERVISORS.	0.4	
7/19/2019	VKB	PREPARE FOR AND ATTEND BOARD MEETING; BRIEF NEW SUPERVISORS ON SUNSHINE LAW, PUBLIC RECORDS LAW, AND ETHICS LAWS.	1.5	
7/24/2019	LB	PREPARE LETTER AND MEMOS TO NEWLY APPOINTED SUPERVISORS, G. HAMMOND AND D. SCHOONOVER RE FLORIDA'S SUNSHINE LAWS, PUBLIC RECORDS AND TEXTING; REVIEW EMAIL FROM N. HICKS RE STATUS OF OWNERSHIP BY THE CDD OF THE MITIGATION AREAS IN THE DISTRICT; RESEARCH PUBLIC RECORDS RE SAME; PREPARE EMAIL TO N. HICKS RE POND AND OTHER TRACTS OWNED BY LENNAR IN THE DISTRICT.	1.2	
8/6/2019	JMV	REVIEW EMAIL FROM N. HICKS; REVIEW PROPERTY RECORDS; DRAFT EMAIL TO N. HICKS.	0.2	
8/7/2019	KMS	REVIEW PROPERTY RECORDS FROM HILLSBOROUGH COUNTY PROPERTY APPRAISER; RESEARCH PLAT FOR PHASE 2; REVIEW PAST DEEDS IN FILE; REVISE SPECIAL WARRANTY DEED AND GRANT OF EASEMENT FROM LENNAR HOMES LLC TO CDD; SEND TO GROUP FOR EXECUTION AND PLACEMENT IN AGENDA; REVIEW COMMUNICATIONS FROM L. COFFEY AND K. EVANS.	0.6	
8/15/2019	JMV	REVIEW AGENDA AND PREPARE FOR CDD BOARD MEETING.	0.4	
Total Professional Services			4.3	\$988.00

August 26, 2019

Client: 001450

Matter: 000001

Invoice #: 17401

Page: 2

#### PERSON RECAP

Person		Hours	Amount
JMV	John M. Vericker	0.6	\$183.00
VKB	Vivek K. Babbar	1.9	\$475.00
KMS	Kristen M. Schalter	0.6	\$150.00
LB	Lynn Butler	1.2	\$180.00

#### DISBURSEMENTS

Date	Description of Disbursements	Amount
7/24/2019	Postage	\$2.90
8/13/2019	Clerk, Circuit Court, Hillsborough County- Recording Fees- Recording Fees/Documentary Stamps (2 deeds)	\$38.40
8/15/2019	Photocopies (24 @ \$0.15)	\$3.60
Total Disbursements		\$44.90

Total Services	\$988.00
Total Disbursements	\$44.90
Total Current Charges	\$1,032.90

**PAY THIS AMOUNT**

**\$1,032.90**

*Please Include Invoice Number on all Correspondence*

Statement Date: 09/20/2019

Account: 211005987436

OAKS AT SHADY CREEK COMM  
10508 PURPLE MARTIN BLVD  
RIVERVIEW, FL 33579-0000

Current month's charges:	\$20.11
Total amount due:	\$20.11
Payment Due By:	10/11/2019

## Your Account Summary

Previous Amount Due	\$19.92
Payment(s) Received Since Last Statement	-\$19.92
Current Month's Charges	\$20.11
<b>Total Amount Due</b>	<b>\$20.11</b>

## Report a streetlight

It's easy to request a streetlight  
or area light repair at  
[tampaelectric.com/reportlight](http://tampaelectric.com/reportlight).



Amount not paid by due date may be assessed a late payment charge and an additional deposit.



## Stay in the know while you're on the go!

Our free Power Updates service makes it easy to get restoration updates by text, email or phone.  
Learn more at [tampaelectric.com/powerupdates](http://tampaelectric.com/powerupdates).

53100  
4301

To ensure prompt credit, please return stub portion of this bill with your payment. Make checks payable to TECO.



### WAYS TO PAY YOUR BILL



See reverse side for more information

Account: 211005987436

Current month's charges:	\$20.11
Total amount due:	\$20.11
Payment Due By:	10/11/2019
<b>Amount Enclosed</b>	<b>\$</b>

669901675717

00002856 02 AV 0.38 33607 FTECO109211911012810 00000 02 01000000 012 02 9730 004



OAKS AT SHADY CREEK COMM  
2005 PAN AM CIRCLE SUITE 300  
TAMPA, FL 33607-6008

MAIL PAYMENT TO:  
TECO  
P.O. BOX 31318  
TAMPA, FL 33631-3318

Received  
SEP 25 2019

**Account:** 211005987436  
**Statement Date:** 09/20/2019  
**Current month's charges due** 10/11/2019

## Details of Charges – Service from 08/16/2019 to 09/17/2019

Service for: 10508 PURPLE MARTIN BLVD, RIVERVIEW, FL 33579-0000

**Rate Schedule: General Service - Non Demand**

Meter Number	Read Date	Current Reading	-	Previous Reading	=	Total Used	Multiplier	Billing Period
K66265	09/17/2019	1,415		1,399		16 kWh	1	33 Days

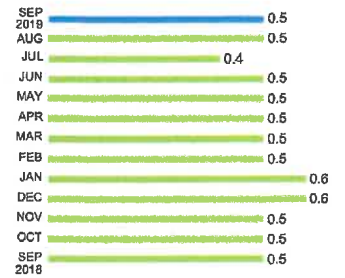
Basic Service Charge		\$18.14
Energy Charge	16 kWh @ \$0.05916/kWh	\$0.95
Fuel Charge	16 kWh @ \$0.03227/kWh	\$0.52
Florida Gross Receipt Tax		\$0.50
<b>Electric Service Cost</b>		<b>\$20.11</b>

**Total Current Month's Charges**

**\$20.11**

### Tampa Electric Usage History

Kilowatt-Hours Per Day  
(Average)



00002856-0005949-Page 3 of 8



## ACCOUNT INVOICE

tampaelectric.com



Statement Date: 09/20/2019

Account: 211005987634

OAKS AT SHADY CREEK COMM  
301 US HIGHWAY 301 S  
TAMPA, FL 33619

Current month's charges:	\$3,486.22
Total amount due:	\$3,486.22
Payment Due By:	10/11/2019

### Your Account Summary

Previous Amount Due	\$3,486.22
Payment(s) Received Since Last Statement	-\$3,486.22
Current Month's Charges	\$3,486.22
<b>Total Amount Due</b>	<b>\$3,486.22</b>

### Report a streetlight

It's easy to request a streetlight  
or area light repair at  
[tampaelectric.com/reportlight](http://tampaelectric.com/reportlight).



Amount not paid by due date may be assessed a late payment charge and an additional deposit.



### Stay in the know while you're on the go!

Our free Power Updates service makes it easy to get restoration updates by text, email or phone.  
Learn more at [tampaelectric.com/powerupdates](http://tampaelectric.com/powerupdates).

53100  
4301

To ensure prompt credit, please return stub portion of this bill with your payment. Make checks payable to TECO.



#### WAYS TO PAY YOUR BILL



See reverse side for more information

Account: 211005987634

Current month's charges:	\$3,486.22
Total amount due:	\$3,486.22
Payment Due By:	10/11/2019

**Amount Enclosed** \$

669901675718

OAKS AT SHADY CREEK COMM  
2005 PAN AM CIRCLE SUITE 300  
TAMPA, FL 33607

MAIL PAYMENT TO:  
TECO  
P.O. BOX 31318  
TAMPA, FL 33631-3318

**Account:** 211005987634  
**Statement Date:** 09/20/2019  
**Current month's charges due** 10/11/2019

## Details of Charges – Service from 08/15/2019 to 09/16/2019

Service for: 301 US HIGHWAY 301 S, TAMPA, FL 33619

**Rate Schedule: Lighting Service**

### Lighting Service Items LS-1 (Bright Choices) for 33 days

Lighting Energy Charge	3576 kWh @ \$0.02904/kWh	\$103.85
Fixture & Maintenance Charge	84 Fixtures	\$1161.72
Lighting Pole / Wire	84 Poles	\$2100.84
Lighting Fuel Charge	3576 kWh @ \$0.03194/kWh	\$114.22
Florida Gross Receipt Tax		\$5.59

**Lighting Charges** **\$3,486.22**

**Total Current Month's Charges** **\$3,486.22**

00002856-0005951-Page 7 of 8





4801 122nd Avenue N  
Clearwater, FL 33762  
Tel 727-822-7866  
Fax 727-269-5490

Invoice		
Purchase Order	Invoice #	Date
	24026	4/16/2019
Job	Job #	Terms
The Oaks of Shady Creek-OTC	24935	Net 30

THE OAKS OF SHADY CREEK C.D.D.  
c/o Meritus Group  
2005 Pan Am Circle., STE 300  
Tampa, FL 33607

Description	Amount
PALM TREE INJECTION: THE OAKS @ SHADY CREEK	\$300.15

W05 53900  
4605

Total	\$300.15
Payments	\$0.00
Balance Due	\$300.15



## Oaks at Shady Creek Community Development District Summary of Operations and Maintenance Invoices

Vendor	Invoice/Account Number	Amount	Vendor Total	Comments/Description
<b>Monthly Contract</b>				
Aquatic Systems, Inc.	458472	\$ 298.00		Lake and Wetland Services - October
Landcare Landscaping, inc.	1262875	4,721.00		Ground Maintenance - October
Meritus Districts	9327	2,818.50		Management Services - October
<b>Monthly Contract Sub-Total</b>		<b>\$ 7,837.50</b>		
<b>Variable Contract</b>				
Florida Land Design & Permitting	10020	\$ 1,237.50		Professional Services - thru 09/27/2019
Grau and Associates	18707	500.00		Audit FYE 09/30/2019
Straley Robin Vericker	17612	1,230.50		Professional Services - thru 10/15/2019
<b>Variable Contract Sub-Total</b>		<b>\$ 2,968.00</b>		
<b>Utilities</b>				
BOCC	7015729919 091819	\$ 159.03		Water Service - thru 09/16/2019
BOCC	7015729919 092519	159.03		Water Service - thru 09/16/2019
BOCC	7015729919 101819	-2.55	<b>\$ 315.51</b>	Water Service - thru 10/11/2019
Tampa Electric	211005987436 102119	20.01		Electric Services - thru 10/16/2019
Tampa Electric	211005987634 102119	3,486.23	<b>\$ 3,506.24</b>	Electric Services - thru 10/15/2019
<b>Utilities Sub-Total</b>		<b>\$ 3,821.75</b>		
<b>Regular Services</b>				
Egis	10016	\$ 6,515.00		Insurance 10/01/2019 thru 10/01/2020
Supervisor: Danny Schoonover	DS092019	200.00		Supervisor Fee - 09/20/2019
Supervisor: Gill Hammond	GH092019	200.00	<b>\$ 400.00</b>	Supervisor Fee - 09/20/2019
<b>Regular Services Sub-Total</b>		<b>\$ 6,915.00</b>		
<b>Additional Services</b>				

## Oaks at Shady Creek Community Development District Summary of Operations and Maintenance Invoices

Vendor	Invoice/Account Number	Amount	Vendor Total	Comments/Description
ADA Site Compliance	875	\$ 1,990.00		Compliance Shield - 10/02/2019
DEO	74618	175.00		FY 2019/2020 Special District Fee - 10/01/2019
Don Harrison Enterprises	2619	2,400.00		Added 3 Sets of Quad Recepticles - 10/16/2019
Meritus	9370	4,200.00		Dissemination Services FY 2019 Bond Series 2016 10/01/2019
Meritus	9389	250.00	<b>\$ 4,450.00</b>	Construciton Accounting Services FY 2019 Series 2016 10/01/2019
POOP 911	2937476	43.12		1 Station Emptied/Bags Filled - 09/24/2019
Tampa Bay Times	20356 101119	341.34		Notice of Meeting Schedule - 10/11/2019
<b>Additional Services Sub-Total</b>		<b>\$ 9,399.46</b>		
<b>TOTAL:</b>		<b>\$ 30,941.71</b>		

**Approved (with any necessary revisions noted):**

Signature

Printed Name

**Title (check one):**

☐ Chairman ☐ Vice Chairman ☐ Assistant Secretary

**Aquatic Systems, Inc.,  
a SOLitude Lake Management Company**

Lake & Wetland Management Services  
2100 NW 33<sup>rd</sup> Street Pompano Beach, FL 33069  
800-432-4302

# Invoice

INVOICE DATE: 10/1/2019  
INVOICE NUMBER: 0000458472  
CUSTOMER NUMBER: 0060790  
PO NUMBER:  
PAYMENT TERMS: Net 30

Oaks @ Shady Crk CDD  
C/O Meritus  
2005 Pan AM Circle Suite 300  
Tampa, FL 33607

Received  
OCT 02 2019

QTY ORD	ITEM DESCRIPTION	U/M	UNIT PRICE	EXT PRICE
1	Monthly Lake and Wetland Services - October		298.00	298.00

WTD 53700 4307

SALES TAX: (0.0%) \$0.00  
LESS PAYMENT: \$0.00  
TOTAL DUE: \$298.00

***A 1.5% FINANCE CHARGE IS ADDED TO BALANCES 31 OR MORE DAYS PAST DUE***

PLEASE RETURN THIS PORTION WITH PAYMENT.  
MAKE CHECKS PAYABLE TO: **Aquatic Systems, Inc.**

☐ Address Changes (Note on Back of this Slip)  
\*Please include contact name and phone number\*

DATE: 10/1/2019  
INVOICE NUMBER: 0000458472  
CUSTOMER NUMBER: 0060790  
TOTAL AMOUNT DUE: \$298.00

Aquatic Systems, Inc., a Solitude Lake  
Management Company  
2100 NW 33<sup>rd</sup> Street  
Pompano Beach, FL 33069

AMOUNT PAID:

**THANK YOU FOR YOUR BUSINESS!**



LANDCARE LANDSCAPING, INC.  
6767 S. LOIS AVENUE  
TAMPA, FL 33616  
813.676.6000 OFFICE  
813.837.1426 FAX

# Invoice

Invoice #

1262875

Date

10/1/2019

Bill To

OAKS AT SHADY CREEK CDD  
C/O MERITUS CORP.  
2005 PAN AM CIRCLE SUITE 300  
TAMPA, FL 33607

P.O. Number	Project	Terms
	OAKS AT SHADY CREEK CDD MAINTENANCE	NET 30
Quantity	Description	Amount
	RE: OAKS AT SHADY CREEK CCD	
	GROUND MAINTENANCE FOR THE MONTH OF OCTOBER 2019 CCD ONLY, PONDS, FRONT ENTRY AND ALL COMMON AREAS.	4,721.00
	LANDCARE APPRECIATES YOUR BUSINESS	
	Landcare Landscaping offers electronic invoices if you would prefer over paper mailed invoices. Please contact our office at <a href="mailto:accountingdept@landcare1.com">accountingdept@landcare1.com</a> if you would like to make this change to receive your invoices electronically.	0.00
<div>53900 4604</div> <div>Received SEP 30 2019</div>		
Should it become necessary for either party incident to this contract to institute legal actions for enforcement of any provisions of this contract, the prevailing party shall be entitled to all court costs and attorney's fees incident to such legal actions.		<b>Total</b> \$4,721.00
A 1.5% LATE FEE WILL BE APPLIED AFTER 30 DAYS OF NON PAYMENT.		

2005 Pan Am Circle  
Suite 300  
Tampa, FL 33607

Voice: 813-397-5121  
Fax: 813-873-7070

Invoice Number: 9327  
Invoice Date: Oct 1, 2019  
Page: 1

**Bill To:**  
Oaks at Shady Creek CDD  
2005 Pan Am Circle  
Suite 300  
Tampa, FL 33607

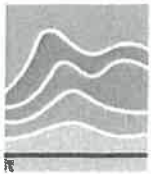
Ship to:	

Customer ID	Customer PO	Payment Terms	
Oaks at Shady Creek		Net Due	
	Shipping Method	Ship Date	Due Date
	Best Way		10/1/19

Quantity	Item	Description	Unit Price	Amount
		District Management Services - October		2,812.50
		Postage - August		6.00

Subtotal	2,818.50
Sales Tax	
Total Invoice Amount	2,818.50
Payment/Credit Applied	
<b>TOTAL</b>	<b>2,818.50</b>

22



# Florida Land Design & Permitting

3030 Starkey Boulevard • Trinity, FL 34655

Nicole Hicks, District Manager  
The Oaks at Shady Creek CDD  
2005 Pan Am Circle, Suite 300  
Tampa, FL 33607

Invoice Date: 9/30/2019  
Invoice #: 10020  
Invoice Period: 8/31/2019 to 9/27/2019  
Project #: 2019-1008

Re: The Oaks at Shady Creek CDD

## Services Performed:

Task 0900 - District Engineer - Tasks Included review of the Southwest Florida Water Management District inspection proposal, verification that tracts have been dedicated to the CDD, field inspection of Tropical Kingbird standing water and follow-up findings.

Classification	Hours	Rate	Amount Due
District Engineer	7.5	\$165.00	\$1,237.50

<b>TOTAL DUE THIS INVOICE</b>	<b>\$1,237.50</b>
-------------------------------	-------------------

WST 51300  
3103

Paul E. Skidmore, P.E., VP/Engineering

## Grau and Associates

951 W. Yamato Road, Suite 280  
Boca Raton, FL 33431-  
www.graucpa.com

Phone: 561-994-9299

Fax: 561-994-5823

*Oaks at Shady Creek, The Community Development District*  
2005 Pan Am Circle, Suite 300  
Tampa, FL 33607

Invoice No. 18707  
Date 09/30/2019

---

SERVICE	AMOUNT
Audit FYE 09/30/2019	\$ 500.00
Current Amount Due	\$ 500.00

0 - 30	31 - 60	61 - 90	91 - 120	Over 120	Balance
500.00	0.00	0.00	0.00	0.00	500.00

Payment due upon receipt.

# Straley Robin Vericker

1510 W. Cleveland Street

Tampa, FL 33606

Telephone (813) 223-9400 \* Facsimile (813) 223-5043

Federal Tax Id. - 20-1778458

The Oaks at Shady Creek CDD  
c/o Meritus Districts  
2005 PAN AM CIRCLE, SUITE 300  
Tampa, FL 33607

October 22, 2019

Client: 001450

Matter: 000001

Invoice #: 17612

Page: 1

RE: General

For Professional Services Rendered Through October 15, 2019

## SERVICES

Date	Person	Description of Services	Hours
9/19/2019	JMV	REVIEW AGENDA PACKET AND PREPARE FOR CDD BOARD MEETING.	0.4
9/20/2019	JMV	PREPARE FOR AND ATTEND CDD BOARD MEETING; REVIEW CDD PROPERTY RECORDS.	1.6
9/20/2019	KMS	REVIEW PLATS FOR PHASE 1 AND PHASE 2; REVIEW DEEDS FROM LENNAR HOMES LLC TO CDD; REVIEW DEED FROM LENNAR HOMES TO HOA; DRAFT PROJECT COMPLETION RESOLUTION AND ENGINEER CERTIFICATE OF COMPLETION FOR 2015 PROJECT.	0.9
9/23/2019	JMV	PREPARE PROJECT COMPLETION DOCUMENTS; DRAFT EMAIL TO N. HICKS; REVIEW EMAIL FROM N. HICKS.	0.7
9/26/2019	LB	PREPARE DRAFT QUARTERLY REPORT TO DISSEMINATION AGENT FOR SERIES 2015 BONDS.	0.2
10/4/2019	JMV	REVIEW COMMUNICATION FROM M. HUBER RE: CDD BOARD MEETING.	0.3
10/7/2019	LB	FINALIZE QUARTERLY REPORT FOR PERIOD ENDED SEPTEMBER 30, 2019; PREPARE EMAIL TO DISSEMINATION AGENT TRANSMITTING SAME.	0.2
10/10/2019	JMV	REVIEW COMMUNICATION RE: CDD MEETING; REVIEW LEGAL NOTICE.	0.1
Total Professional Services			4.4
			\$1,230.50



October 22, 2019

Client: 001450

Matter: 000001

Invoice #: 17612

Page: 2

#### PERSON RECAP

Person		Hours	Amount
JMV	John M. Vericker	3.1	\$945.50
KMS	Kristen M. Schalter	0.9	\$225.00
LB	Lynn Butler	0.4	\$60.00

Total Services	\$1,230.50	
Total Disbursements	\$0.00	
Total Current Charges		\$1,230.50

**PAY THIS AMOUNT**

**\$1,230.50**

*Please Include Invoice Number on all Correspondence*



Hillsborough  
County Florida

CUSTOMER NAME	ACCOUNT NUMBER	BILL DATE	DUE DATE
THE OAKS AT SHADY CREEK CDD	7015729919	09/18/2019	10/09/2019

Service Address: 14099 TROPICAL KINGBIRD WAY

S-Page 1 of 1

METER NUMBER	PREVIOUS DATE	PREVIOUS READ	PRESENT DATE	PRESENT READ	CONSUMPTION (IN GALLONS)	READ TYPE	METER DESCRIPTION
53984411	08/14/2019	4309	09/16/2019	4575	26600	ACTUAL	WATER

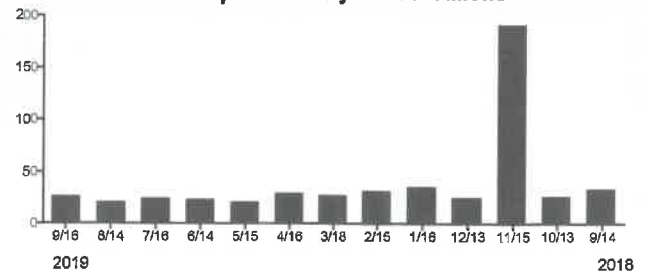
#### Service Address Charges

Customer Bill Charge	\$4.21
Purchase Water Pass-Thru	\$77.94
Water Base Charge	\$57.73
Water Usage Charge	\$19.15
<b>Total Service Address Charges</b>	<b>\$159.03</b>

#### Summary of Account Charges

Previous Balance	\$137.13
Net Payments - Thank You	(\$137.13)
<b>Total Account Charges</b>	<b>\$159.03</b>
<b>AMOUNT DUE</b>	<b>\$159.03</b>

Consumption History x 1000 Gallons



Hillsborough  
County Florida

Make checks payable to: **BOCC**

ACCOUNT NUMBER: 7015729919

Received  
SEP 30 2019

#### ELECTRONIC PAYMENTS BY CHECK OR

Automated Payment Line: (813) 276 8526  
Internet Payments: [HCFLGov.net/WaterBill](http://HCFLGov.net/WaterBill)  
Additional Information: [HCFLGov.net/Water](http://HCFLGov.net/Water)



**THANK YOU!**



THE OAKS AT SHADY CREEK CDD  
2005 PAN AM CIR STE 300  
TAMPA FL 33607-6008

4,926

DUE DATE	10/09/2019
AMOUNT DUE	\$159.03
AMOUNT PAID	

0070157299192

66  
00000159038



Hillsborough  
County Florida

CUSTOMER NAME	ACCOUNT NUMBER	BILL DATE	DUE DATE
THE OAKS AT SHADY CREEK CDD	7015729919	09/25/2019	10/16/2019

Service Address: 14099 TROPICAL KINGBIRD WAY

S-Page 1 of 1

METER NUMBER	PREVIOUS DATE	PREVIOUS READ	PRESENT DATE	PRESENT READ	CONSUMPTION (IN GALLONS)	READ TYPE	METER DESCRIPTION
53984411	08/14/2019	4309	09/16/2019	4575	26600	ACTUAL	WATER

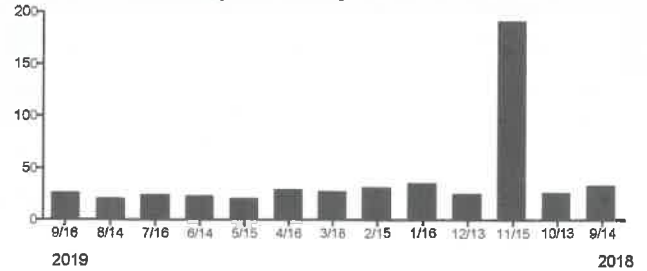
**Service Address Charges**

Customer Bill Charge	\$4.21
Purchase Water Pass-Thru	\$77.94
Water Base Charge	\$57.73
Water Usage Charge	\$19.15
<b>Total Service Address Charges</b>	<b>\$159.03</b>

**Summary of Account Charges**

Previous Balance	\$137.13
Net Payments - Thank You	(\$137.13)
<b>Total Account Charges</b>	<b>\$159.03</b>
<b>AMOUNT DUE</b>	<b>\$159.03</b>

Consumption History x 1000 Gallons



Hillsborough  
County Florida

Make checks payable to: **BOCC**

ACCOUNT NUMBER: 7015729919

Received

SEP 30 2019

**ELECTRONIC PAYMENTS BY CHECK OR**

Automated Payment Line: (813) 276 8526  
Internet Payments: [HCFLGov.net/WaterBill](http://HCFLGov.net/WaterBill)  
Additional Information: [HCFLGov.net/Water](http://HCFLGov.net/Water)



**THANK YOU!**



THE OAKS AT SHADY CREEK CDD  
2005 PAN AM CIR STE 300  
TAMPA FL 33607-6008

4,880

<b>DUE DATE</b>	10/16/2019
<b>AMOUNT DUE</b>	\$159.03
<b>AMOUNT PAID</b>	

0070157299192

67  
00000159038



Hillsborough  
County Florida

CUSTOMER NAME	ACCOUNT NUMBER	BILL DATE	DUE DATE
THE OAKS AT SHADY CREEK CDD	7015729919	10/18/2019	11/08/2019

Service Address: 14099 TROPICAL KINGBIRD WAY

S-Page 1 of 1

METER NUMBER	PREVIOUS DATE	PREVIOUS READ	PRESENT DATE	PRESENT READ	CONSUMPTION (IN GALLONS)	READ TYPE	METER DESCRIPTION
53984411	09/16/2019	4575	10/11/2019	4834	25900	ACTUAL	WATER

#### Service Address Charges

Customer Bill Charge	\$4.21
Purchase Water Pass-Thru	\$75.89
Water Base Charge	\$57.73
Water Usage Charge	\$18.65
<b>Total Service Address Charges</b>	<b>\$156.48</b>

#### Summary of Account Charges

Previous Balance	\$159.03
Net Payments - Thank You	(\$318.06)
Credit Amount	(\$159.03)
<b>Total Account Charges</b>	<b>\$156.48</b>

<b>AMOUNT DUE</b>	<b>(\$2.55)</b>
-------------------	-----------------

#### Important Message

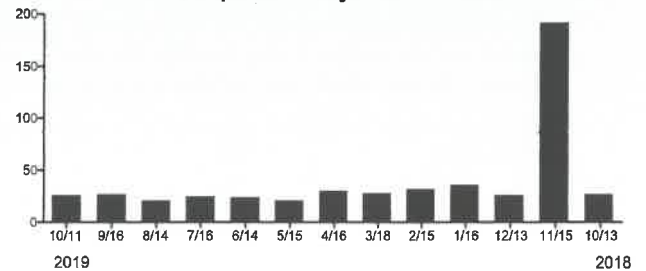
Do you have a large yard with high water irrigation usage? Call Paula Staples, UF/IFAS Extension Hillsborough County, (813) 744-5519 X 54142, to see if a free irrigation evaluation can help lower your outdoor water use and conserve water for our future.

The Board approved a rate increase of 4.74% effective October 1, 2019. For additional information please visit our webpage: <http://HCFLGov.net/Water> and select Water Rates & Fees.

#### Notice

CREDIT BALANCE - DO NOT PAY.

Consumption History x 1000 Gallons



Hillsborough  
County Florida

Make checks payable to: BOCC

ACCOUNT NUMBER: 7015729919

Received  
OCT 25 2019

#### ELECTRONIC PAYMENTS BY CHECK OR

Automated Payment Line: (813) 276 8526  
Internet Payments: [HCFLGov.net/WaterBill](http://HCFLGov.net/WaterBill)  
Additional Information: [HCFLGov.net/Water](http://HCFLGov.net/Water)



**THANK YOU!**



THE OAKS AT SHADY CREEK CDD  
2005 PAN AM CIR STE 300  
TAMPA FL 33607-6008

747

**DUE DATE** 11/08/2019

**Credit Balance  
DO NOT PAY**

## ACCOUNT INVOICE

tampaelectric.com



OAKS AT SHADY CREEK COMM  
10508 PURPLE MARTIN BLVD  
RIVERVIEW, FL 33579-0000

Statement Date: 10/21/2019  
Account: 211005987436

Current month's charges:	\$20.01
Total amount due:	\$20.01
Payment Due By:	11/11/2019

### Your Account Summary

Previous Amount Due	\$20.11
Payment(s) Received Since Last Statement	-\$20.11
<b>Current Month's Charges</b>	<b>\$20.01</b>
<b>Total Amount Due</b>	<b>\$20.01</b>



Always assume that a downed power line is energized. Visit [tampaelectric.com/safety](http://tampaelectric.com/safety) for more safety tips.

*Amount not paid by due date may be assessed a late payment charge and an additional deposit.*

## Go solar now! No roof required.

Sun Select shared solar is a simple way to have solar, whether or not a rooftop system is an option for you. Go to [tampaelectric.com/sunselect](http://tampaelectric.com/sunselect) to see why Sun Select makes sense for you, the community, and the environment.



To ensure prompt credit, please return stub portion of this bill with your payment. Make checks payable to TECO.



### WAYS TO PAY YOUR BILL



See reverse side for more information

Account: 211005987436

Current month's charges:	\$20.01
Total amount due:	\$20.01
Payment Due By:	11/11/2019

**Amount Enclosed**

\$

657556052283

OAKS AT SHADY CREEK COMM  
2005 PAN AM CIRCLE SUITE 300  
TAMPA, FL 33607

MAIL PAYMENT TO:  
TECO  
P.O. BOX 31318  
TAMPA, FL 33631-3318

6575560522832110059874360000000020019



# ACCOUNT INVOICE

tampaelectric.com



**Account:** 211005987436  
**Statement Date:** 10/21/2019  
**Current month's charges due** 11/11/2019

## Details of Charges – Service from 09/18/2019 to 10/16/2019

Service for: 10508 PURPLE MARTIN BLVD, RIVERVIEW, FL 33579-0000

**Rate Schedule: General Service - Non Demand**

Meter Number	Read Date	Current Reading	-	Previous Reading	=	Total Used	Multiplier	Billing Period
K66265	10/16/2019	1,430		1,415		15 kWh	1	29 Days

Basic Service Charge  
Energy Charge  
Fuel Charge  
Florida Gross Receipt Tax  
**Electric Service Cost**

15 kWh @ \$0.05916/kWh  
15 kWh @ \$0.03227/kWh

\$18.14  
\$0.89  
\$0.48  
\$0.50

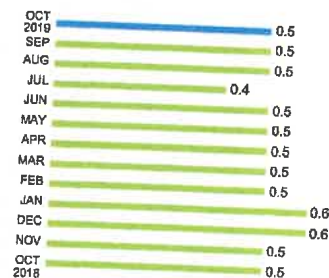
**\$20.01**

**Total Current Month's Charges**

**\$20.01**

### Tampa Electric Usage History

Kilowatt-Hours Per Day  
(Average)



## Important Messages

**We've requested a bill reduction for you.**

You heard right! We're proposing another reduction to energy bills for 2020. If approved by the Florida Public Service Commission, Tampa Electric residential customers' bills would drop again in January, and would continue to be among the lowest in Florida – about the same as customers paid in 2013 – and would be about 21 percent below the national average. There you have it ... electricity is a real value.



OAKS AT SHADY CREEK COMM  
301 US HIGHWAY 301 S  
TAMPA, FL 33619

Statement Date: 10/21/2019  
Account: 211005987634

Current month's charges:	\$3,486.23
Total amount due:	\$3,486.23
Payment Due By:	11/11/2019

**Your Account Summary**

Previous Amount Due	\$3,486.22
Payment(s) Received Since Last Statement	-\$3,486.22
<b>Current Month's Charges</b>	<b>\$3,486.23</b>
<b>Total Amount Due</b>	<b>\$3,486.23</b>



Always assume that a downed power line is energized. Visit [tampaelectric.com/safety](http://tampaelectric.com/safety) for more safety tips.

Amount not paid by due date may be assessed a late payment charge and an additional deposit.

**Go solar now! No roof required.**

Sun Select shared solar is a simple way to have solar, whether or not a rooftop system is an option for you. Go to [tampaelectric.com/sunselect](http://tampaelectric.com/sunselect) to see why Sun Select makes sense for you, the community, and the environment.



To ensure prompt credit, please return stub portion of this bill with your payment. Make checks payable to TECO.



**WAYS TO PAY YOUR BILL**



See reverse side for more information

Account: 211005987634

Current month's charges:	\$3,486.23
Total amount due:	\$3,486.23
Payment Due By:	11/11/2019

**Amount Enclosed**

\$

657556052284

00002404 02 AV 0.38 33607 FYECO110221900212010 00000 02 01000000 010 02 8048 004



OAKS AT SHADY CREEK COMM  
2005 PAN AM CIRCLE SUITE 300  
TAMPA, FL 33607-6008

MAIL PAYMENT TO:  
TECO  
P.O. BOX 31318  
TAMPA, FL 33631-3318

Received  
OCT 25 2019

6575560522842110059876340000003486231

## ACCOUNT INVOICE

tampaelectric.com



Account: 211005987634  
 Statement Date: 10/21/2019  
 Current month's charges due 11/11/2019

### Details of Charges – Service from 09/17/2019 to 10/15/2019

Service for: 301 US HIGHWAY 301 S, TAMPA, FL 33619

#### Rate Schedule: Lighting Service

#### Lighting Service Items LS-1 (Bright Choices) for 29 days

Lighting Energy Charge	3549 kWh @ \$0.02904/kWh	\$103.06
Fixture & Maintenance Charge	84 Fixtures	\$1163.42
Lighting Pole / Wire	84 Poles	\$2100.84
Lighting Fuel Charge	3549 kWh @ \$0.03194/kWh	\$113.36
Florida Gross Receipt Tax		\$5.55
<b>Lighting Charges</b>		

**\$3,486.23**

### Total Current Month's Charges

**\$3,486.23**

00002404-0004849- Page 3 of 8

### Important Messages

#### We've requested a bill reduction for you.

You heard right! We're proposing another reduction to energy bills for 2020. If approved by the Florida Public Service Commission, Tampa Electric residential customers' bills would drop again in January, and would continue to be among the lowest in Florida – about the same as customers paid in 2013 – and would be about 21 percent below the national average. There you have it ... electricity is a real value.







The Oaks at Shady Creek Community Development District  
c/o Meritus  
2005 Pan Am Circle, Ste 120  
Tampa 33607

# INVOICE

<b>Customer</b>	The Oaks at Shady Creek Community Development District
<b>Acct #</b>	761
<b>Date</b>	10/07/2019
<b>Customer Service</b>	Charisse Bitner
<b>Page</b>	1 of 1

Payment Information	
<b>Invoice Summary</b>	\$ 6,515.00
<b>Payment Amount</b>	
<b>Payment for:</b>	Invoice#10016
100119706	

Thank You

Please detach and return with payment



Customer: The Oaks at Shady Creek Community Development District

Invoice	Effective	Transaction	Description	Amount
10016	10/01/2019	Renew policy	Policy #100119706 10/01/2019-10/01/2020 Florida Insurance Alliance Package - Renew policy Due Date: 10/7/2019  <i>Property - \$2415</i> <i>Gen. Liab - \$2050</i> <i>Pub. Off - \$2050</i>	6,515.00
				<b>Total</b>
				\$ 6,515.00

Thank You

FOR PAYMENTS SENT OVERNIGHT:  
Egis Insurance Advisors LLC, Fifth Third Wholesale Lockbox, Lockbox #234021, 4900 W. 95th St Oaklawn, IL 60453

<b>Remit Payment To: Egis Insurance Advisors, LLC</b>	(321)233-9939	<b>Date</b>
Lockbox 234021 PO Box 84021 Chicago, IL 60689-4002	sclimer@egisadvisors.com	10/07/2019

The Oaks at Shady Creek CDD

MEETING DATE: September 20, 2019

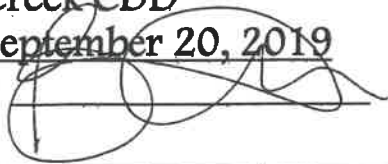
DMS Staff Signature 

SUPERVISORS	CHECK IF IN ATTENDANCE	STATUS	PAYMENT AMOUNT
Kelly Evans		Salary Waived	\$0.00
Laura Coffey	X	Salary Waived	\$0.00
Paulo Beckert	X	Salary Waived	\$0.00
Danny (Dan) Schoonover	X	Salary Accepted	\$200.00
Gill Hammond	X	Salary Accepted	\$200.00

DS 092019

**The Oaks at Shady Creek CDD**

**MEETING DATE:** September 20, 2019

**DMS Staff Signature** 

SUPERVISORS	CHECK IF IN ATTENDANCE	STATUS	PAYMENT AMOUNT
Kelly Evans		Salary Waived	\$0.00
Laura Coffey	X	Salary Waived	\$0.00
Paulo Beckert	X	Salary Waived	\$0.00
Danny (Dan) Schoonover	X	Salary Accepted	\$200.00
Gill Hammond	X	Salary Accepted	\$200.00

GH 092019

**ADA Site Compliance**

6400 Boynton Beach Blvd 742721  
Boynton Beach, FL 33474  
accounting@adasitecompliance.com

**Invoice****BILL TO**

The Oaks at Shady Tree CDD

INVOICE #	DATE	TOTAL DUE	DUE DATE	TERMS	ENCLOSED
875	10/02/2019	\$1,990.00	10/16/2019	Net 14	

DESCRIPTION	AMOUNT
Compliance Shield, Customized Accessibility Policy, and Technological Audit	1,990.00

**BALANCE DUE**

**\$1,990.00**

WOT 51300  
5103

**Florida Department of Economic Opportunity, Special District Accountability Program**  
**FY 2019/2020 Special District Fee Invoice and Update Form**  
 Required by Sections 189.064 and 189.018, Florida Statutes, and Chapter 73C-24, Florida Administrative Code

Invoice No.: 74618			Date Invoiced: 10/01/2019
Annual Fee: \$175.00	Late Fee: \$0.00	Received: \$0.00	Total Due, Postmarked by 12/02/2019: \$175.00

**STEP 1:** Review the following information, make changes directly on the form, and sign and date:

**1. Special District's Name, Registered Agent's Name, and Registered Office Address:**



**Oaks at Shady Creek Community Development District**

Mr. Brian K. Lamb

2005 Pan Am Circle, Suite 120

Tampa, FL 33607

**Received**  
 OCT 04 2019

2. Telephone: (813) 873-7300  
 3. Fax: (813) 873-7070  
 4. Email: brian.lamb@merituscorp.com  
 5. Status: Independent  
 6. Governing Body: Elected  
 7. Website Address: theoaksatshadycreekcdd.org  
 8. County(ies): Hillsborough  
 9. Function(s): Community Development  
 10. Boundary Map on File: 07/09/2015  
 11. Creation Document on File: 07/09/2015  
 12. Date Established: 12/10/2014  
 13. Creation Method: Local Ordinance  
 14. Local Governing Authority: Hillsborough County  
 15. Creation Document(s): County Ordinance 14-38  
 16. Statutory Authority: Chapter 190, Florida Statutes  
 17. Authority to Issue Bonds: Yes  
 18. Revenue Source(s): Assessments  
 19. Most Recent Update: 10/05/2018

I do hereby certify that the information above (changes noted if necessary) is accurate and complete as of this date.

Registered Agent's Signature: *Brian K. Lamb* Date 10/4/19

**STEP 2:** Pay the annual fee or certify eligibility for the zero fee:

a. **Pay the Annual Fee:** Pay the annual fee online by following the instructions at [www.Floridajobs.org/SpecialDistrictFee](http://www.Floridajobs.org/SpecialDistrictFee) or by check payable to the Department of Economic Opportunity.

b. **Or, Certify Eligibility for the Zero Fee:** By initialing each of the following items, I, the above signed registered agent, do hereby certify that to the best of my knowledge and belief, **ALL** of the following statements contained herein and on any attachments hereto are true, correct, complete, and made in good faith as of this date. I understand that any information I give may be verified.

- 1.\_\_\_\_ This special district and its Certified Public Accountant determined the special district is not a component unit of a local general-purpose government.
- 2.\_\_\_\_ This special district is in compliance with the reporting requirements of the Department of Financial Services.
- 3.\_\_\_\_ This special district reported \$3,000 or less in annual revenues to the Department of Financial Services on its Fiscal Year 2017/2018 Annual Financial Report (if created since then, attach an income statement verifying \$3,000 or less in revenues).

Department Use Only: Approved:\_\_\_\_ Denied:\_\_\_\_ Reason:\_\_\_\_\_

**STEP 3:** Make a copy of this form for your records.

**STEP 4:** Mail this form and payment (if paying by check) to the Department of Economic Opportunity, Bureau of Budget Management, 107 E. Madison Street, MSC 120, Tallahassee, FL 32399-4124. Direct any questions to (850) 717-8430.



Don Harrison Enterprises  
2510 Priscilla Court  
Lutz, FL 33559  
(813) 363-6286

TO: Nicole Hicks

Job Name: The Oaks at Shady Creek

Job Address: Off U.S. HWY 301

Description: Adding Receptacles to Monuments for future X-mas lighting

Proposal / Estimate

All labor and materials to add (3) sets of Quad G.F.C.I. Protected receptacles with weatherproof in-use covers (1) per each of the three monuments located at the main entrance. Will need to utilize the existing PVC conduit chases currently being used for the low voltage lighting, and add 2 small low voltage transformers to re-power the low voltage lights. This will eliminate the need to jack and bore new PVC chases under the roadways. New photo-cell's will be installed for low voltage operation at each of the three existing locations as needed for lighting control.

We hereby propose to furnish materials and labor-complete in accordance with the above specifications or scope of work for the sum of \$ 2,400.00  
Two thousand, four hundred dollars.

Payment to be made as follows: 15 day net term billing upon completion.

All material is guaranteed to be as specified. All work to be done in a workmanlike manner according to standard practices. Any alteration or deviation from the above specification or scope of work involving extra cost will be executed only upon a written change order and will become an extra cost over the above estimate. All agreements contingent upon strikes, Accidents, or delays beyond our control. Owner to carry fire, Tornado, and other necessary insurance. All invoices are due and payable 30 days of date of invoice. Any delinquent accounts will be subject to a monthly service charge of 12% Per month. Should we incur any cost or expense in collecting per the terms of this agreement, the undersigned agrees to pay all cost and expenses including reasonable attorney fees.

Acceptance of proposal: The above prices, Specification and conditions are satisfactory and hereby Accepted. You are authorized to proceed with the work as specified. Payment will be outlined above.

Signature Nicole Hicks Date 10/1/2019

Authorized Signature \_\_\_\_\_ Date \_\_\_\_\_



**Meritus Districts**

2005 Pan Am Circle  
Suite 300  
Tampa, FL 33607

Voice: 813-397-5121  
Fax: 813-873-7070

**INVOICE**

Invoice Number: 9370  
Invoice Date: Oct 1, 2019  
Page: 1

**Bill To:**

Oaks at Shady Creek CDD  
2005 Pan Am Circle  
Suite 300  
Tampa, FL 33607

**Ship to:****Customer ID**

Oaks at Shady Creek

**Customer PO****Payment Terms**

Net Due

**Shipping Method**

Best Way

**Ship Date****Due Date**

10/1/19

Quantity	Item	Description	Unit Price	Amount
		Dissemination Services Fiscal Year 2019 Bond Series 2016		4,200.00
		51300 3104		

Subtotal	4,200.00
Sales Tax	
Total Invoice Amount	4,200.00
Payment/Credit Applied	
<b>TOTAL</b>	<b>4,200.00</b>



**Meritus Districts**

2005 Pan Am Circle

Suite 300

Tampa, FL 33607

Voice: 813-397-5121

Fax: 813-873-7070

**INVOICE**

Invoice Number: 9389

Invoice Date: Oct 1, 2019

Page: 1

**Bill To:**

Oaks at Shady Creek CDD  
2005 Pan Am Circle  
Suite 300  
Tampa, FL 33607

**Ship to:****Customer ID**

Oaks at Shady Creek

**Customer PO****Payment Terms**

Net Due

**Shipping Method**

Best Way

**Ship Date****Due Date**

10/1/19

Quantity	Item	Description	Unit Price	Amount
		Construction accounting services Bond Series 2016, FY 2019		250.00
		51300 3201		

Subtotal	250.00
Sales Tax	
Total Invoice Amount	250.00
Payment/Credit Applied	
<b>TOTAL</b>	<b>250.00</b>

# Service Slip/Invoice

POOP 911  
PO BOX 844482  
Dallas, TX 75284-4482  
877-766-7911

INVOICE: 2937476  
DATE: 9/24/2019  
ORDER:

Bill To: [132872]  
The Oaks at Shady Creek CDD  
C/O Meritus  
2005 PAN AM CIR  
Suite 120  
TAMPA, FL 33607-2359

Work Location: [132872] 813-397-5120  
The Oaks at Shady Creek CDD  
C/O Meritus  
13956 US-301  
RIVERVIEW, FL 33579

Work Date	Time	Target Pest	Technician		Time In
9/24/2019	12:00 AM		BLAKEW	Blake Wanecski	
Purchase Order	Terms	Last Service	Map Code		Time Out
		3/27/2019			

Service	Description	Price
SPECPRICE	1 station emptied/bags filled	43.12
		<b>SUBTOTAL</b> \$43.12
		<b>TAX</b> \$0.00
		<b>AMT. PAID</b> \$0.00
		<b>TOTAL</b> \$43.12
		<b>AMOUNT DUE</b> \$43.12

WA 5390 4605

Balances outstanding over 30 days from the date of service may be subject to a late fee of the lesser of 1.5% per month (18% per year) or the maximum allowed by law. Customer agrees to pay accrued expenses in the event of collection.

I hereby acknowledge the satisfactory completion of all services rendered, and agree to pay the cost of services as specified above.

PLEASE PAY FROM THIS INVOICE

# Tampa Bay Times

tampabay.com

Times Publishing Company

DEPT 3396

PO BOX 123396

DALLAS, TX 75312-3396

Toll Free Phone: 1 (877) 321-7355

Fed Tax ID 59-0482470

## ADVERTISING INVOICE

Advertising Run Dates		Advertiser Name	
10/11/19		THE OAKS AT SHADY CREEK CDD	
Billing Date	Sales Rep	Customer Account	
10/11/2019	Deirdre Almeida	44291	
Total Amount Due		Ad Number	
\$341.34		0000020356	

## PAYMENT DUE UPON RECEIPT

Start	Stop	Ad Number	Product	Placement	Description PO Number	Ins.	Size	Net Amount
10/11/19	10/11/19	0000020356	Times	Legals CLS	Meeting Schedule	1	2x48 L	\$339.34
10/11/19	10/11/19	0000020356	Tampabay.com	Legals CLS	Meeting Schedule	1	2x48 L	\$0.00
					AffidavitMaterial			\$2.00
<p style="text-align: center;">WA 51300 4801</p> <p style="text-align: right; color: red;">Received OCT 18 2019</p>								

PLEASE DETACH AND RETURN LOWER PORTION WITH YOUR REMITTANCE

# Tampa Bay Times

tampabay.com

DEPT 3396

PO BOX 123396

DALLAS, TX 75312-3396

Toll Free Phone: 1 (877) 321-7355

## ADVERTISING INVOICE

Thank you for your business.

Advertising Run Dates		Advertiser Name	
10/11/19		THE OAKS AT SHADY CREEK CDD	
Billing Date	Sales Rep	Customer Account	
10/11/2019	Deirdre Almeida	44291	
Total Amount Due		Ad Number	
\$341.34		0000020356	

DO NOT SEND CASH BY MAIL

PLEASE MAKE CHECK PAYABLE TO:

TIMES PUBLISHING COMPANY

REMIT TO:

THE OAKS AT SHADY CREEK CDD  
C/O MERITUS CORP  
2005 PAN AM CIRCLE #300  
TAMPA, FL 33607

Times Publishing Company  
DEPT 3396  
PO BOX 123396  
DALLAS, TX 75312-3396



## Oaks at Shady Creek Community Development District Summary of Operations and Maintenance Invoices

Vendor	Invoice/Account Number	Amount	Vendor Total	Comments/Description
<b>Monthly Contract</b>				
Aquatic Systems, Inc.	461385	\$ 298.00		Lake and Wetland Services - November
Landcare Landscaping, Inc.	1263191	4,721.00		Grounds Maintenance - November
Meritus Districts	9413	2,814.08		Management Services - November
<b>Monthly Contract Sub-Total</b>		<b>\$ 7,833.08</b>		
<b>Variable Contract</b>				
<b>Variable Contract Sub-Total</b>		<b>\$ 0.00</b>		
<b>Utilities</b>				
BOCC	7015729919 111919	\$ 138.17		Water Service - thru 11/12/19
Tampa Electric	211005987436 111919	21.23		Electric Service - thru 11/15/19
Tampa Electric	211005987634 111919	3,486.23	<b>\$ 3,507.46</b>	Electric Service - thru 11/13/19
<b>Utilities Sub-Total</b>		<b>\$ 3,645.63</b>		
<b>Regular Services</b>				
<b>Regular Services Sub-Total</b>		<b>\$ 0.00</b>		
<b>Additional Services</b>				
Landcare Landscaping, Inc.	1263245	\$ 815.00		Install Flowers - 11/12/19
<b>Additional Services Sub-Total</b>		<b>\$ 815.00</b>		
<b>TOTAL:</b>		<b>\$ 12,293.71</b>		

Approved (with any necessary revisions noted):

# Oaks at Shady Creek Community Development District Summary of Operations and Maintenance Invoices

Vendor	Invoice/Account Number	Amount	Vendor Total	Comments/Description
--------	---------------------------	--------	-----------------	----------------------

Signature

Printed Name

**Title (check one):**

☐ Chairman ☐ Vice Chairman ☐ Assistant Secretary

**Aquatic Systems, Inc.,  
a SOLitude Lake Management Company**

Lake & Wetland Management Services  
2100 NW 33<sup>rd</sup> Street Pompano Beach, FL 33069  
800-432-4302

# Invoice

INVOICE DATE: 11/1/2019  
INVOICE NUMBER: 0000461385  
CUSTOMER NUMBER: 0060790  
PO NUMBER:  
PAYMENT TERMS: Net 30

Oaks @ Shady Crk CDD  
C/O Meritus  
2005 Pan AM Circle Suite 300  
Tampa, FL 33607

QTY ORD	ITEM DESCRIPTION	U/M	UNIT PRICE	EXT PRICE
1	Monthly Lake and Wetland Services - November		298.00	298.00

*Handwritten:* 53960  
4307

**Received**  
NOV 04 2019

SALES TAX: (0.0%) \$0.00  
LESS PAYMENT: \$0.00  
TOTAL DUE: \$298.00

***A 1.5% FINANCE CHARGE IS ADDED TO BALANCES 31 OR MORE DAYS PAST DUE***

PLEASE RETURN THIS PORTION WITH PAYMENT.  
MAKE CHECKS PAYABLE TO: **Aquatic Systems, Inc.**

- ☐ Address Changes (Note on Back of this Slip)  
\*Please include contact name and phone number\*

DATE: 11/1/2019  
INVOICE NUMBER: 0000461385  
CUSTOMER NUMBER: 0060790  
TOTAL AMOUNT DUE: \$298.00

Aquatic Systems, Inc., a Solitude Lake  
Management Company  
2100 NW 33<sup>rd</sup> Street  
Pompano Beach, FL 33069

AMOUNT PAID:

**THANK YOU FOR YOUR BUSINESS!**

**LANDCARE LANDSCAPING, INC.**  
**6767 S. LOIS AVENUE**  
**TAMPA, FL 33616**  
**813.676.6000 OFFICE**  
**813.837.1426 FAX**

# Invoice

<b>Invoice #</b>
1263191
<b>Date</b>
11/1/2019

Bill To
OAKS AT SHADY CREEK CDD C/O MERITUS CORP. 2005 PAN AM CIRCLE SUITE 300 TAMPA, FL 33607

P.O. Number	Project	Terms
	OAKS AT SHADY CREEK CDD MAINTENANCE	NET 30
Quantity	Description	Amount
	<p>RE: OAKS AT SHADY CREEK CCD</p> <p>           GROUNDS MAINTENANCE FOR THE MONTH OF NOVEMBER 2019            CCD ONLY, PONDS, FRONT ENTRY AND ALL COMMON AREAS.         </p> <p>LANDCARE APPRECIATES YOUR BUSINESS</p> <p>Landcare Landscaping offers electronic invoices if you would prefer over paper mailed invoices. Please contact our office at <a href="mailto:accountingdept@landcare1.com">accountingdept@landcare1.com</a> if you would like to make this change to receive your invoices electronically.</p> <p>WMS 53910 4604</p>	<p>4,721.00</p> <p>0.00</p>
<p>Should it become necessary for either party incident to this contract to institute legal actions for enforcement of any provisions of this contract, the prevailing party shall be entitled to all court costs and attorney's fees incident to such legal actions.</p>		<p><b>Total</b> \$4,721.00</p>
<p>A 1.5% LATE FEE WILL BE APPLIED AFTER 30 DAYS OF NON PAYMENT.</p>		



2005 Pan Am Circle  
Suite 300  
Tampa, FL 33607

Voice: 813-397-5121  
Fax: 813-873-7070

# INVOICE

Invoice Number: 9413  
Invoice Date: Nov 1, 2019  
Page: 1

<b>Bill To:</b>
Oaks at Shady Creek CDD 2005 Pan Am Circle Suite 300 Tampa, FL 33607

<b>Ship to:</b>

Customer ID	Customer PO	Payment Terms	
Oaks at Shady Creek		Net Due	
	Shipping Method	Ship Date	Due Date
	Best Way		11/1/19

Quantity	Item	Description	Unit Price	Amount
		District Management Services - November		2,812.50
		Postage - September		1.58

Subtotal	2,814.08
Sales Tax	
Total Invoice Amount	2,814.08
Payment/Credit Applied	
<b>TOTAL</b>	<b>2,814.08</b>



Hillsborough  
County Florida

CUSTOMER NAME	ACCOUNT NUMBER	BILL DATE	DUE DATE
THE OAKS AT SHADY CREEK CDD	7015729919	11/19/2019	12/10/2019

Service Address: 14099 TROPICAL KINGBIRD WAY

S-Page 1 of 1

METER NUMBER	PREVIOUS DATE	PREVIOUS READ	PRESENT DATE	PRESENT READ	CONSUMPTION (IN GALLONS)	READ TYPE	METER DESCRIPTION
53984411	10/11/2019	4834	11/12/2019	5040	20600	ACTUAL	WATER

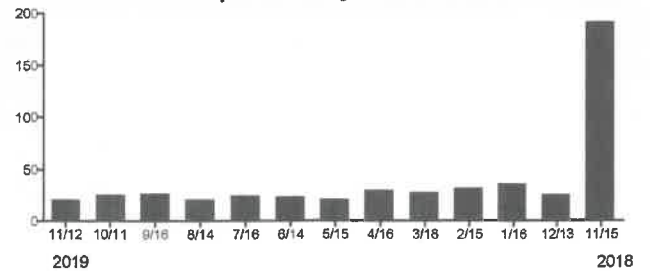
#### Service Address Charges

Customer Bill Charge	\$4.41
Purchase Water Pass-Thru	\$60.36
Water Base Charge	\$60.50
Water Usage Charge	\$15.45
<b>Total Service Address Charges</b>	<b>\$140.72</b>

#### Summary of Account Charges

Previous Balance	(\$2.55)
Net Payments - Thank You	\$0.00
Credit Amount	(\$2.55)
<b>Total Account Charges</b>	<b>\$140.72</b>
<b>AMOUNT DUE</b>	<b>\$138.17</b>

Consumption History x 1000 Gallons



Hillsborough  
County Florida

Make checks payable to: **BOCC**

ACCOUNT NUMBER: 7015729919

Received  
NOV 25 2019

#### ELECTRONIC PAYMENTS BY CHECK OR

Automated Payment Line: (813) 276 8526  
Internet Payments: [HCFLGov.net/WaterBill](http://HCFLGov.net/WaterBill)  
Additional Information: [HCFLGov.net/Water](http://HCFLGov.net/Water)



**THANK YOU!**



THE OAKS AT SHADY CREEK CDD  
2005 PAN AM CIR STE 300  
TAMPA FL 33607-6008

3,435

DUE DATE	12/10/2019
AMOUNT DUE	\$138.17
AMOUNT PAID	

0070157299192

90  
00000138172

OAKS AT SHADY CREEK COMM  
10508 PURPLE MARTIN BLVD  
RIVERVIEW, FL 33579-0000

Statement Date: 11/19/2019  
Account: 211005987436

Current month's charges:	\$21.23
Total amount due:	\$21.23
Payment Due By:	12/10/2019

**Your Account Summary**

Previous Amount Due	\$20.01
Payment(s) Received Since Last Statement	-\$20.01
<b>Current Month's Charges</b>	<b>\$21.23</b>
<b>Total Amount Due</b>	<b>\$21.23</b>

**Digging? Make the right call**



**Know what's below.  
Call before you dig.**

Call 811 two business days before your project to have utility lines marked for free. Utility lines can easily be damaged by planting trees, installing fences, etc. Avoid potential service interruptions for you and your neighbors. Digging on Saturday? Call 811 by Wednesday. Visit **sunshine811.com** or **tampaelectric.com/811**.

00003044-0006438-Page 1 of 8

Amount not paid by due date may be assessed a late payment charge and an additional deposit.



**Stay informed with e-News Update**

Sign up for our free e-News Update online newsletter and receive updates about programs, weather, community events and more, straight to your inbox. Visit **tampaelectric.com/emailsignup** today.

To ensure prompt credit, please return stub portion of this bill with your payment. Make checks payable to TECO.



**WAYS TO PAY YOUR BILL**



See reverse side for more information

Account: 211005987436

Current month's charges:	\$21.23
Total amount due:	\$21.23
Payment Due By:	12/10/2019

**Amount Enclosed** \$ \_\_\_\_\_  
671136272224

00003044 02 AV 0.38 33607 FTECO111201800173610 00000 02 01000000 012 02 8752 004



OAKS AT SHADY CREEK COMM  
2005 PAN AM CIRCLE SUITE 300  
TAMPA, FL 33607-6008

**Received**

**NOV 25 2019**

MAIL PAYMENT TO:  
TECO  
P.O. BOX 31318  
TAMPA, FL 33631-3318

6711362722242110059874360000000021232

# ACCOUNT INVOICE

tampaelectric.com



**Account:** 211005987436  
**Statement Date:** 11/19/2019  
**Current month's charges due** 12/10/2019

## Details of Charges – Service from 10/17/2019 to 11/15/2019

Service for: 10508 PURPLE MARTIN BLVD, RIVERVIEW, FL 33579-0000

**Rate Schedule: General Service - Non Demand**

Meter Number	Read Date	Current Reading	-	Previous Reading	=	Total Used	Multiplier	Billing Period
K66265	11/15/2019	1,458		1,430		28 kWh	1	30 Days

Basic Service Charge  
 Energy Charge  
 Fuel Charge  
 Florida Gross Receipt Tax  
**Electric Service Cost**

28 kWh @ \$0.05916/kWh  
 28 kWh @ \$0.03227/kWh

\$18.14  
 \$1.66  
 \$0.90  
 \$0.53

**\$21.23**

**\$21.23**

**Total Current Month's Charges**

### Tampa Electric Usage History

Kilowatt-Hours Per Day (Average)



## Important Messages

### We continue to add more solar to our fuel mix

We're proud to be the state's top producer of solar energy per customer. Our existing solar projects can power more than 100,000 homes with the sun. Visit our solar page at [tampaelectric.com/solar](http://tampaelectric.com/solar) to learn more. For the 12-month period ending Sept. 2019, the percentage of fuel type used by Tampa Electric to provide electricity to its customers was Natural Gas & Oil\* 84%, Coal 6%, Purchased Power 7% and Solar 3%. Tampa Electric provides this information to our customers on a quarterly basis.

\*Oil makes up less than 1%

## ACCOUNT INVOICE

tampaelectric.com



OAKS AT SHADY CREEK COMM  
301 US HIGHWAY 301 S  
TAMPA, FL 33619

Statement Date: 11/19/2019  
Account: 211005987634

Current month's charges:	\$3,486.23
Total amount due:	\$3,486.23
Payment Due By:	12/10/2019

### Your Account Summary

Previous Amount Due	\$3,486.23
Payment(s) Received Since Last Statement	-\$3,486.23
<b>Current Month's Charges</b>	<b>\$3,486.23</b>
<b>Total Amount Due</b>	<b>\$3,486.23</b>

### Digging? Make the right call



**Know what's below.  
Call before you dig.**

Call 811 two business days before your project to have utility lines marked for free. Utility lines can easily be damaged by

planting trees, installing fences, etc. Avoid potential service interruptions for you and your neighbors. Digging on Saturday? Call 811 by Wednesday. Visit **sunshine811.com** or **tampaelectric.com/811**.

*Amount not paid by due date may be assessed a late payment charge and an additional deposit.*



### Stay informed with e-News Update

Sign up for our free e-News Update online newsletter and receive updates about programs, weather, community events and more, straight to your inbox. Visit **tampaelectric.com/emailsignup** today.

To ensure prompt credit, please return stub portion of this bill with your payment. Make checks payable to TECO.



#### WAYS TO PAY YOUR BILL



See reverse side for more information

Account: 211005987634

Current month's charges:	\$3,486.23
Total amount due:	\$3,486.23
Payment Due By:	12/10/2019

**Amount Enclosed**

\$

671136272225

OAKS AT SHADY CREEK COMM  
2005 PAN AM CIRCLE SUITE 300  
TAMPA, FL 33607

MAIL PAYMENT TO:  
TECO  
P.O. BOX 31318  
TAMPA, FL 33631-3318

6711362722252110059876340000003486231

## ACCOUNT INVOICE

tampaelectric.com



Account: 211005987634  
Statement Date: 11/19/2019  
Current month's charges due 12/10/2019

### Details of Charges – Service from 10/16/2019 to 11/13/2019

Service for: 301 US HIGHWAY 301 S, TAMPA, FL 33619

#### Rate Schedule: Lighting Service

#### Lighting Service Items LS-1 (Bright Choices) for 29 days

Lighting Energy Charge	3546 kWh @ \$0.02904/kWh	\$102.98
Fixture & Maintenance Charge	84 Fixtures	\$1163.61
Lighting Pole / Wire	84 Poles	\$2100.84
Lighting Fuel Charge	3546 kWh @ \$0.03194/kWh	\$113.26
Florida Gross Receipt Tax		\$5.54

#### Lighting Charges

\$3,486.23

#### Total Current Month's Charges

**\$3,486.23**

00003044-0005442-Page 7 of 8

### Important Messages

#### We continue to add more solar to our fuel mix

We're proud to be the state's top producer of solar energy per customer. Our existing solar projects can power more than 100,000 homes with the sun. Visit our solar page at [tampaelectric.com/solar](http://tampaelectric.com/solar) to learn more. For the 12-month period ending Sept. 2019, the percentage of fuel type used by Tampa Electric to provide electricity to its customers was Natural Gas & Oil\* 84%, Coal 6%, Purchased Power 7% and Solar 3%. Tampa Electric provides this information to our customers on a quarterly basis.

\*Oil makes up less than 1%





LANDCARE LANDSCAPING, INC.  
6767 S. LOIS AVENUE  
TAMPA, FL 33616  
813.676.6000 OFFICE  
813.837.1426 FAX

# Invoice

Invoice #

1263245

Date

11/12/2019

Bill To

OAKS AT SHADY CREEK CDD  
C/O MERITUS CORP.  
2005 PAN AM CIRCLE SUITE 300  
TAMPA, FL 33607

P.O. Number	Project	Terms
	LANDSCAPE AND EXTRAS	
Quantity	Description	Amount
	LANDCARE PROVIDED ALL LABOR AND MATERIAL TO COMPLETE THE FOLLOWING:  OAKS AT SHADY CREEK CDD:  INSTALL APPROX. (400) FLOWERS IN FLOWER BEDS TO FRONT ENTRANCE. LABOR, AND DUMP FEES TO PREP BEDS AND ADD FERTILIZER FOR NEW PLANTS.	740.00 75.00
Should it become necessary for either party incident to this contract to institute legal actions for enforcement of any provisions of this contract, the prevailing party shall be entitled to all court costs and attorney's fees incident to such legal actions.		<b>Total</b> \$815.00
A 1.5% LATE FEE WILL BE APPLIED AFTER 30 DAYS OF NON PAYMENT.		

5390  
4604

WHD

Received  
NOV 14 2019



## Oaks at Shady Creek Community Development District Summary of Operations and Maintenance Invoices

Vendor	Invoice/Account Number	Amount	Vendor Total	Comments/Description
<b>Monthly Contract</b>				
Landcare Landscaping, Inc.	1263389	\$ 4,721.00		Grounds Maintenance - December
Meritus Districts	9516	2,818.00		Management Services - December
Solitude Lake management	PI A00329795	298.00		Lake & Pond Management - December
<b>Monthly Contract Sub-Total</b>		<b>\$ 7,837.00</b>		

<b>Variable Contract</b>				
Straley Robin Vericker	17513	\$ 485.25		Professional Services - General - thru 09/15/19
Straley Robin Vericker	17715	152.50	<b>\$ 637.75</b>	Professional Services - General - thru 11/15/19
<b>Variable Contract Sub-Total</b>		<b>\$ 637.75</b>		

<b>Utilities</b>				
BOCC	7015729919 121819	\$ 148.08		Water Service - thru 12/12/19
Tampa Electric	211005987436 121919	21.42		Electric Service - thru 12/17/19
Tampa Electric	211005987634 121919	3,486.23	<b>\$ 3,507.65</b>	Electric Service - thru 12/13/19
<b>Utilities Sub-Total</b>		<b>\$ 3,655.73</b>		

<b>Regular Services</b>				
<b>Regular Services Sub-Total</b>		<b>\$ 0.00</b>		

<b>Additional Services</b>				
Affordable Backflow Testing	15819	\$ 50.00		Backflow Preventor Test - 12/04/19
POOP 911	3047422	43.12		Empty Station & Fill Bags - 11/26/19
Spearem Enterprises, LLC	4088	1,450.00		Pressure Wash Concrete - 12/13/19
<b>Additional Services Sub-Total</b>		<b>\$ 1,543.12</b>		



## Oaks at Shady Creek Community Development District Summary of Operations and Maintenance Invoices

Vendor	Invoice/Account Number	Amount	Vendor Total	Comments/Description
<b>TOTAL:</b>		<b>\$ 13,673.60</b>		

**Approved (with any necessary revisions noted):**

Signature

Printed Name

**Title (check one):**

☐ Chairman ☐ Vice Chairman ☐ Assistant Secretary



<b>Invoice #</b>
1263389
<b>Date</b>
12/1/2019

OAKS AT SHADY CREEK CDD  
C/O MERITUS CORP.  
2005 PAN AM CIRCLE SUITE 300  
TAMPA, FL 33607

Received  
NOV 27 2019

98

2005 Pan Am Circle  
Suite 300  
Tampa, FL 33607

Voice: 813-397-5121  
Fax: 813-873-7070

# INVOICE

Invoice Number: 9516  
Invoice Date: Dec 1, 2019  
Page: 1

**Bill To:**  
Oaks at Shady Creek CDD  
2005 Pan Am Circle  
Suite 300  
Tampa, FL 33607

<b>Ship to:</b>	

Customer ID	Customer PO	Payment Terms	
Oaks at Shady Creek		Net Due	
	Shipping Method	Ship Date	Due Date
	Best Way		12/1/19

[illegible]

Subtotal	2,818.80
Sales Tax	
Total Invoice Amount	2,818.80
Payment/Credit Applied	
<b>TOTAL</b>	<b>2,818.80</b>

# SOLITUDE

## LAKE MANAGEMENT

Voice: (888) 480-LAKE • Fax: (888) 358-0088

## INVOICE

Invoice Number: PI-A00329795

Invoice Date: 12/01/19

PROPERTY: Oaks @ Shady  
Crk Cdd

SOLD TO: Oaks @ Shady Crk Cdd  
C/O Meritus  
2005 Pan AM Circle Suite 300  
Tampa, FL 33607

Customer ID	Customer PO	Payment Terms	
8184		Net 30	
Sales Rep ID	Shipping Method	Ship Date	Due Date
Josh F. McGarry			12/31/19

Qty	Item Description	Unit Price	Extension
1	Lake & Pond Management Services SVR49021 12/01/19 - 12/31/19 Lake & Pond Management Services	298.00	298.00

WAT 535100  
4307

Received

DEC 13 2019

PLEASE REMIT PAYMENT TO:

SOLitude Lake Management, LLC  
1320 Brookwood Drive, Suite H  
Little Rock, AR 72202

Subtotal	298.00
Sales Tax	0.00
Total Invoice	298.00
Payment Received	0.00
<b>TOTAL</b>	<b>298.00</b>

# Straley Robin Vericker

1510 W. Cleveland Street

Tampa, FL 33606

Telephone (813) 223-9400 \* Facsimile (813) 223-5043

Federal Tax Id. - 20-1778458

The Oaks at Shady Creek CDD  
c/o Meritus Districts  
2005 PAN AM CIRCLE, SUITE 300  
Tampa, FL 33607

September 20, 2019  
Client: 001450  
Matter: 000001  
Invoice #: 17513

Page: 1

RE: General

For Professional Services Rendered Through September 15, 2019

## SERVICES

Date	Person	Description of Services	Hours
8/16/2019	JMV	PREPARE FOR AND ATTEND CDD BOARD MEETING.	1.4
9/13/2019	JMV	REVIEW EMAIL FROM B. CRUTCHFIELD; REVIEW LEGAL NOTICE.	0.1
Total Professional Services			1.5

\$457.50

## PERSON RECAP

Person	Hours	Amount
JMV John M. Vericker	1.5	\$457.50

## DISBURSEMENTS

Date	Description of Disbursements	Amount
8/13/2019	XPRESS DELIVERIES, LLC- Courier Service- Courier Services	\$27.75
Total Disbursements		\$27.75

September 20, 2019  
Client: 001450  
Matter: 000001  
Invoice #: 17513

Page: 2

---

Total Services	\$457.50	
Total Disbursements	\$27.75	
Total Current Charges		\$485.25

**PAY THIS AMOUNT**

**\$485.25**

*Please Include Invoice Number on all Correspondence*

# Straley Robin Vericker

1510 W. Cleveland Street

Tampa, FL 33606

Telephone (813) 223-9400 \* Facsimile (813) 223-5043

Federal Tax Id. - 20-1778458

The Oaks at Shady Creek CDD  
c/o Meritus Districts  
2005 PAN AM CIRCLE, SUITE 300  
Tampa, FL 33607

November 22, 2019

Client: 001450

Matter: 000001

Invoice #: 17715

Page: 1

RE: General

For Professional Services Rendered Through November 15, 2019

## SERVICES

Date	Person	Description of Services	Hours
11/8/2019	JMV	REVIEW LEGAL NOTICE RE: CDD BOARD MEETING.	0.1
11/12/2019	JMV	REVIEW COMMUNICATION FROM N. HICKS; CONFERENCE CALL WITH N. HICKS.	0.4
Total Professional Services			0.5

\$152.50

## PERSON RECAP

Person	Hours	Amount
JMV John M. Vericker	0.5	\$152.50

November 22, 2019  
Client: 001450  
Matter: 000001  
Invoice #: 17715

Page: 2

---

Total Services	\$152.50	
Total Disbursements	\$0.00	
Total Current Charges		\$152.50

**PAY THIS AMOUNT**

**\$152.50**

***Please Include Invoice Number on all Correspondence***





Hillsborough  
County Florida

CUSTOMER NAME	ACCOUNT NUMBER	BILL DATE	DUE DATE
THE OAKS AT SHADY CREEK CDD	7015729919	12/18/2019	01/08/2020

Service Address: 14099 TROPICAL KINGBIRD WAY

S-Page 1 of 1

Received  
DEC 23 2019



METER NUMBER	PREVIOUS DATE	PREVIOUS READ	PRESENT DATE	PRESENT READ	CONSUMPTION (IN GALLONS)	READ TYPE	METER DESCRIPTION
53984411	11/12/2019	5040	12/12/2019	5266	22600	ACTUAL	WATER

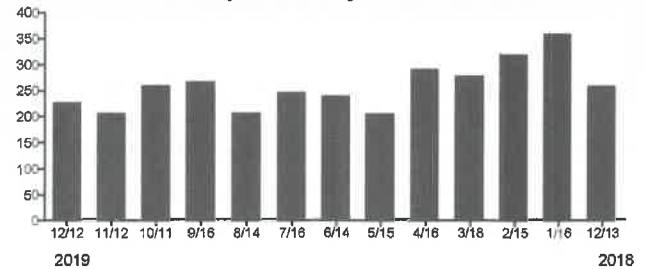
**Service Address Charges**

Customer Bill Charge	\$4.41
Purchase Water Pass-Thru	\$66.22
Water Base Charge	\$60.50
Water Usage Charge	\$16.95
<b>Total Service Address Charges</b>	<b>\$148.08</b>

**Summary of Account Charges**

Previous Balance	\$138.17
Net Payments - Thank You	(\$138.17)
<b>Total Account Charges</b>	<b>\$148.08</b>
<b>AMOUNT DUE</b>	<b>\$148.08</b>

Consumption History x 100 Gallons



Make checks payable to: **BOCC**

ACCOUNT NUMBER: 7015729919

Hillsborough  
County Florida

**ELECTRONIC PAYMENTS BY CHECK OR**

Automated Payment Line: (813) 276 8526  
Internet Payments: [HCFLGov.net/WaterBill](http://HCFLGov.net/WaterBill)  
Additional Information: [HCFLGov.net/Water](http://HCFLGov.net/Water)



**THANK YOU!**



THE OAKS AT SHADY CREEK CDD  
2005 PAN AM CIR STE 300  
TAMPA FL 33607-6008

3,457

DUE DATE	01/08/2020
AMOUNT DUE	\$148.08
AMOUNT PAID	

0070157299192

00000148081



## ACCOUNT INVOICE

tampaelectric.com

f t p g in  
**Received**

Statement Date: 12/19/2019  
Account: 211005987436

**DEC 23 2019**

OAKS AT SHADY CREEK COMM  
10508 PURPLE MARTIN BLVD  
RIVERVIEW, FL 33579-0000

Current month's charges:	\$21.42
Total amount due:	\$21.42
Payment Due By:	01/09/2020

### Your Account Summary

Previous Amount Due	\$21.23
Payment(s) Received Since Last Statement	-\$21.23
<b>Current Month's Charges</b>	<b>\$21.42</b>
<b>Total Amount Due</b>	<b>\$21.42</b>

**Help neighbors in need  
this holiday season.**



Our Share program makes it easy for you to help customers in need pay their electric and/or natural gas bills.  
Visit [tampaelectric.com/share](http://tampaelectric.com/share) and [peoplesgas.com/share](http://peoplesgas.com/share) to learn more.

Amount not paid by due date may be assessed a late payment charge and an additional deposit.



### We're shedding new light on dark winter nights.

#### New LED lighting will bring:

- **Energy savings** – up to 60% more efficient
- **Performance** – longer life and superior lighting
- **Safety** – wide, consistent light pattern improves visibility

Visit [tampaelectric.com/newLEDs](http://tampaelectric.com/newLEDs) to learn more about the benefits and when we'll be in a neighborhood near you.

To ensure prompt credit, please return stub portion of this bill with your payment. Make checks payable to TECO.



#### WAYS TO PAY YOUR BILL



See reverse side for more information

Account: 211005987436

Current month's charges:	\$21.42
Total amount due:	\$21.42
Payment Due By:	01/09/2020

**Amount Enclosed** \$

677309117161

00000492 02 AV 0.38 33607 FTECO112201904265410 00000 03 01000000 013 02 13978 004



OAKS AT SHADY CREEK COMM  
2005 PAN AM CIRCLE SUITE 300  
TAMPA, FL 33607-6008

MAIL PAYMENT TO:  
TECO  
P.O. BOX 31318  
TAMPA, FL 33631-3318



6773091171612110059874360000000021422

**Account:** 211005987436  
**Statement Date:** 12/19/2019  
**Current month's charges due** 01/09/2020

## Details of Charges – Service from 11/16/2019 to 12/17/2019

Service for: 10508 PURPLE MARTIN BLVD, RIVERVIEW, FL 33579-0000

**Rate Schedule: General Service - Non Demand**

Meter Number	Read Date	Current Reading	-	Previous Reading	=	Total Used	Multiplier	Billing Period
K66265	12/17/2019	1,488		1,458		30 kWh	1	32 Days

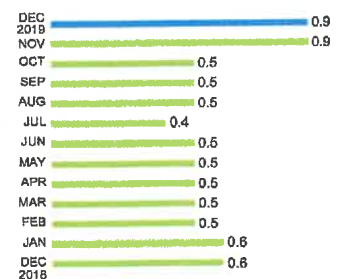
Basic Service Charge		\$18.14
Energy Charge	30 kWh @ \$0.05916/kWh	\$1.77
Fuel Charge	30 kWh @ \$0.03227/kWh	\$0.97
Florida Gross Receipt Tax		\$0.54
<b>Electric Service Cost</b>		<b>\$21.42</b>

**Total Current Month's Charges**

**\$21.42**

### Tampa Electric Usage History

Kilowatt-Hours Per Day  
(Average)



## Important Messages

### Warmest wishes from our family to yours

All of us at Tampa Electric wish you a wonderful holiday season and a very happy new year. We're proud to provide you with the safe, reliable and affordable energy that fuels your life.

### Good news! Look for a credit on your next bill.

The credit will be based upon your usage, but figure about \$9 if you average 1,000 kilowatt-hours a month. After recovering costs of restoring power for Hurricane Irma and other storms, Tampa Electric still had savings from a recent federal tax law change – this credit is returning these savings back to customers. The credit was proposed by Tampa Electric, approved by the Florida Public Service Commission and supported by Florida's Office of Public Counsel, the Florida Industrial Power Users Group and the Florida Retail Federation.



Statement Date: 12/19/2019

Account: 211005987634

OAKS AT SHADY CREEK COMM  
301 US HIGHWAY 301 S  
TAMPA, FL 33619

Current month's charges:	\$3,486.23
Total amount due:	\$3,486.23
Payment Due By:	01/09/2020

## Your Account Summary

Previous Amount Due	\$3,486.23
Payment(s) Received Since Last Statement	-\$3,486.23
Current Month's Charges	\$3,486.23
<b>Total Amount Due</b>	<b>\$3,486.23</b>

**Help neighbors in need  
this holiday season.**



Our Share program makes it easy for you to help customers in need pay their electric and/or natural gas bills.

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To ensure prompt credit, please return stub portion of this bill with your payment. Make checks payable to TECO.



## WAYS TO PAY YOUR BILL



See reverse side for more information

Account: 211005987634

Current month's charges:	\$3,486.23
Total amount due:	\$3,486.23
Payment Due By:	01/09/2020

**Amount Enclosed** \$

6773091171622110059876340000003486232



OAKS AT SHADY CREEK COMM  
2005 PAN AM CIRCLE SUITE 300  
TAMPA, FL 33607

MAIL PAYMENT TO:  
TECO  
P.O. BOX 31318  
TAMPA, FL 33631-3318

**Account:** 211005987634  
**Statement Date:** 12/19/2019  
**Current month's charges due** 01/09/2020

## Details of Charges – Service from 11/14/2019 to 12/13/2019

Service for: 301 US HIGHWAY 301 S, TAMPA, FL 33619

**Rate Schedule: Lighting Service**

### Lighting Service Items LS-1 (Bright Choices) for 30 days

Lighting Energy Charge	3546 kWh @ \$0.02904/kWh	\$102.98
Fixture & Maintenance Charge	84 Fixtures	\$1163.61
Lighting Pole / Wire	84 Poles	\$2100.84
Lighting Fuel Charge	3546 kWh @ \$0.03194/kWh	\$113.26
Florida Gross Receipt Tax		\$5.54

### Lighting Charges

**\$3,486.23**

### Total Current Month's Charges

**\$3,486.23**

00000492-0001000-Page 7 of 8

## Important Messages

### Warmest wishes from our family to yours

All of us at Tampa Electric wish you a wonderful holiday season and a very happy new year. We're proud to provide you with the safe, reliable and affordable energy that fuels your life.

### Good news! Look for a credit on your next bill.

The credit will be based upon your usage, but figure about \$9 if you average 1,000 kilowatt-hours a month. After recovering costs of restoring power for Hurricane Irma and other storms, Tampa Electric still had savings from a recent federal tax law change – this credit is returning these savings back to customers. The credit was proposed by Tampa Electric, approved by the Florida Public Service Commission and supported by Florida's Office of Public Counsel, the Florida Industrial Power Users Group and the Florida Retail Federation.



21C-12-4-19

12-19

# Affordable Backflow Testing

3423 Holland Dr.  
Brandon, FL 33511  
(813) 684-3386

NAME <i>The Oaks at Shady Creek CDD</i>		DATE OF ORDER <i>12-4-19</i>	
ADDRESS <i>40 Meritus Corp.</i>		PHONE <i>377-5120</i>	
JOB NAME & LOCATION <i>14099 Tropical Kingbird Way, River view</i>		DATE PROMISED	
DESCRIPTION OF WORK		ORDER TAKEN BY	
QTY.	DESCRIPTION	PRICE	AMOUNT
<i>1</i>	<i>Backflow Preventer Test</i>		<i>\$50.00</i>
LABOR		HOURS	RATE
AMOUNT		TOTAL MATERIALS	
TOTAL LABOR		TAX	
TOTAL		<i>Thank You TOTAL \$50.00</i>	

WORK ORDER FILED BY  
*440-7096*  
*Gene Roberts*

JOB INVOICE  
**15819**

DATE COMPLETED

SIGNATURE I hereby acknowledge the satisfactory completion of the above described work.

*WJ*  
*539W*  
*H6611*





**Hillsborough  
County Florida**

Public Utilities Department  
Cross-Connection Control Unit  
PO Box 89547  
Tampa, Florida 33689-0401  
Fax: 813-635-1612  
[www.hillsboroughcounty.org/backflow](http://www.hillsboroughcounty.org/backflow)  
Email: [backflowprogram@hillsboroughcounty.org](mailto:backflowprogram@hillsboroughcounty.org)

Revision 06/01/2018

**Customer/Site Information**

Customer The Oaks at Shady Creek CDP

Mailing Address 2005 Pan Am Circle #120

City Tampa State FL Zip 33607

Contact Person  Phone #

Type Facility Common Area

Site Address 14099 Tropical Kingbird Way, Riverview

Location Details @ meter

City  Zip

Contact Person  Phone #

Current Date  Hazard #:

☒ Existing ☐ Replaced ☐ New

Please Note: The meter number is mandatory and if not included on this form it will not be accepted.

**Assembly Data**

Type of Service  
☐ Domestic ☒ Irrigation ☐ Fire Line

Size 1" Type of Assembly RP

**Assembly Data Existing**

Manufacturer Wilkins Size 1"

Model # 965 Serial # 4180249

Meter # 63984411 Meter Size

**Assembly Data New**

Manufacturer  Size

Model #  Serial #

Meter #  Meter Size

Permit #

New Installation or Replacement by

Type of Assembly

Installation Date

Phone #

**CHECK VALVE #1**

☐ Leaked ☒ Closed Tight  
Differential Pressure  
Reading Across  
Check Valve 9.4

**CHECK VALVE #2**

☐ Leaked ☒ Closed Tight  
Differential Pressure  
Reading Across  
Check Valve 2.4

**RELIEF VALVE**

Open @ 2.5  
Did Not Open ☐

**PRESSURE VACUUM BREAKER**

Air Inlet Open @   
Did Not Open ☐  
Check Valve Held @

**PASS/FAIL/TEST DATE**

☒ Pass ☐ Fail  
Test Date 12-4-19

Tester

David Forrester

Certification #

3913

Test Kit #

157392

Test Kit exp date

7-10-20

☐ Assembly Repaired

Repair Date

Repair Cert #

Company

**CHECK VALVE #1**

☐ Leaked ☐ Closed Tight  
Differential Pressure  
Reading Across  
Check Valve

**CHECK VALVE #2**

☐ Leaked ☐ Closed Tight  
Differential Pressure  
Reading Across  
Check Valve

**RELIEF VALVE**

Open @   
Did Not Open ☐

**PRESSURE VACUUM BREAKER**

Air Inlet Open @   
Did Not Open ☐  
Check Valve Held @

**PASS/FAIL/TEST DATE**

☐ Pass ☐ Fail  
Test Date

Tester

Certification #

Test Kit #

Test Kit exp date

# Service Slip/Invoice

POOP 911  
PO BOX 844482  
Dallas, TX 75284-4482  
877-766-7911

INVOICE: 3047422  
DATE: 11/26/2019  
ORDER:

Bill To: [132872]  
The Oaks at Shady Creek CDD  
C/O Meritus  
2005 PAN AM CIR  
Suite 120  
TAMPA, FL 33607-2359

Work Location: [132872] 813-397-5120  
The Oaks at Shady Creek CDD  
C/O Meritus  
13956 US-301  
RIVERVIEW, FL 33579

Work Date	Time	Target Pest	Technician	Time In
11/26/2019	12:00 AM		BLAKEW	
Purchase Order	Terms	Last Service	Map Code	Time Out
		3/27/2019		

Service	Description	Price
SPECPRICE	1 station emptied/bags filled	43.12
		<b>SUBTOTAL</b>
		\$43.12
		<b>TAX</b>
		\$0.00
		<b>AMT. PAID</b>
		\$0.00
		<b>TOTAL</b>
		\$43.12
		<b>AMOUNT DUE</b>
		\$43.12

\* Balances outstanding over 30 days from the date of service may be subject to a late fee of the lesser of 1.5% per month (18% per year) or the maximum allowed by law.  
Customer agrees to pay accrued expenses in the event of collection.

I hereby acknowledge the satisfactory completion of all services rendered, and agree to pay the cost of services as specified above.

PLEASE PAY FROM THIS INVOICE



**Spearem Enterprises, LLC**

18865 state rd 54 ste 122

land o lakes, FL 33558

(727) 237-2316

spearem.jmb@gmail.com



# INVOICE

**BILL TO**

The Oaks at Shady Creek CDD

Meritus

2005 Pan Am Circle, Suite 120

Tampa , FL 33607

**INVOICE #** 4088**DATE** 12/13/2019**DUE DATE** 12/13/2019**TERMS** Due on receipt

DESCRIPTION	QTY	RATE	AMOUNT
<b>Labor</b>	1	1,450.00	1,450.00
Entryway Monuments at US 301			
Pressure Wash, prep and paint all concrete and trim surfaces.			
Cost includes labor and material.			

It is anticipated that permits will not be required for the above work, and if required, the associated costs will be added to the price stated below. Any existing conditions that are not reasonably discoverable prior to the job start date, which in anyway interferes with the safe and satisfactory completion of this job, will be corrected by an additional work order and estimate for approval prior to resuming job. Spearem Enterprises, LLC is not responsible for any delays in performance of service that are due in full or in part to circumstances beyond our control. Spearem Enterprises, LLC is not responsible for damage, personal or property damage by others at the job site.

Whether actual or consequential, or any claim arising out of or relating to "Acts of God".

Job will Commence within 30 days of receiving signed, approved proposal-weather permitting.

**BALANCE DUE****\$1,450.00**

WAT  
53900 - 4603

# **The Oaks at Shady Creek Community Development District**

**Financial Statements  
(Unaudited)**

**Period Ending  
December 31, 2019**



**Meritus Districts  
2005 Pan Am Circle ~ Suite 300 ~ Tampa, Florida 33607  
Phone (813) 873-7300 ~ Fax (813) 873-7070**

# The Oaks at Shady Creek CDD

## Balance Sheet

As of 12/31/2019

		General Fund	Debt Service - Series 2015	Capital Project - Series 2015	General Fixed Assets Account Group	General Long-Term Debt	Total
<b>Assets</b>							
10101	Cash-Operating Account	321,603.70	0.00	0.00	0.00	0.00	321,603.70
10123	Cash - Revenue - Series 2015 #7000	0.00	441,872.23	0.00	0.00	0.00	441,872.23
10124	Cash - Reserve - Series 2015 #7004	0.00	109,996.33	0.00	0.00	0.00	109,996.33
10125	Cash - Interest - Series 2015 #7002	0.00	54.17	0.00	0.00	0.00	54.17
10127	Cash - Principal - Series 2015 #7001	0.00	0.00	0.00	0.00	0.00	0.00
10128	Cash - Sinking Fund - Series 2015 #7005	0.00	12.47	0.00	0.00	0.00	12.47
10129	Cash - Acq/Construction Gen Fund - Series 2015 #7010	0.00	0.80	495.08	0.00	0.00	495.88
11501	Accounts Receivable - Other	0.00	0.00	0.00	0.00	0.00	0.00
12101	Due From Developer	0.00	0.00	0.00	0.00	0.00	0.00
12114	Assessments Receivable - Tax Roll	0.00	0.00	0.00	0.00	0.00	0.00
13101	Due From General Fund	0.00	0.00	0.00	0.00	0.00	0.00
15500	Prepaid Expense	0.00	0.00	0.00	0.00	0.00	0.00
15501	Prepaid General Liability Insurance	0.00	0.00	0.00	0.00	0.00	0.00
15502	Prepaid Public Officials Insurance	0.00	0.00	0.00	0.00	0.00	0.00
15503	Prepaid Trustee Fees	2,083.31	0.00	0.00	0.00	0.00	2,083.31
15504	Prepaid Property Insurance	0.00	0.00	0.00	0.00	0.00	0.00
15601	Deposits	6,865.00	0.00	0.00	0.00	0.00	6,865.00
16990	Construction Work In Progress	0.00	0.00	0.00	5,823,190.64	0.00	5,823,190.64
18000	Amount Available-Debt Service	0.00	0.00	0.00	0.00	415,384.24	415,384.24
18100	Amount To Be Provided-Debt Service	0.00	0.00	0.00	0.00	5,836,627.76	5,836,627.76
	Other	0.00	0.00	0.00	0.00	0.00	0.00
	<b>Total Assets</b>	<b>330,552.01</b>	<b>551,936.00</b>	<b>495.08</b>	<b>5,823,190.64</b>	<b>6,252,012.00</b>	<b>12,958,185.73</b>
<b>Liabilities</b>							
20200	Accounts Payable	4,609.92	0.00	0.00	0.00	0.00	4,609.92
20702	Due To Debt Service Fund	0.00	0.00	0.00	0.00	0.00	0.00
21800	Accrued Expenses Payable	0.00	0.00	0.00	0.00	0.00	0.00
22005	Due to Developer	0.00	0.00	0.00	0.00	0.00	0.00
23295	Revenue Bond Payable - Series 2015	0.00	0.00	0.00	0.00	6,252,012.00	6,252,012.00
	Other	0.00	0.00	0.00	0.00	0.00	0.00

# The Oaks at Shady Creek CDD

## Balance Sheet

As of 12/31/2019

	General Fund	Debt Service - Series 2015	Capital Project - Series 2015	General Fixed Assets Account Group	General Long-Term Debt	Total
Total Liabilities	<u>4,609.92</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>6,252,012.00</u>	<u>6,256,621.92</u>
Fund Equity & Other Credits						
24700 Fund Balance-All Other Reserves	0.00	415,384.24	493.73	0.00	0.00	415,877.97
27100 Fund Balance-Unreserved	133,520.01	0.00	0.00	0.00	0.00	133,520.01
27200 Retained Earnings-Unreserved	0.00	0.00	0.00	0.00	0.00	0.00
28000 Investment In General Fixed Assets	0.00	0.00	0.00	5,823,190.64	0.00	5,823,190.64
Other	<u>192,422.08</u>	<u>136,551.76</u>	<u>1.35</u>	<u>0.00</u>	<u>0.00</u>	<u>328,975.19</u>
Total Fund Equity & Other Credits	<u>325,942.09</u>	<u>551,936.00</u>	<u>495.08</u>	<u>5,823,190.64</u>	<u>0.00</u>	<u>6,701,563.81</u>
Total Liabilities & Fund Equity	<u>330,552.01</u>	<u>551,936.00</u>	<u>495.08</u>	<u>5,823,190.64</u>	<u>6,252,012.00</u>	<u>12,958,185.73</u>

# The Oaks at Shady Creek CDD

## Statement of Revenues and Expenditures

001 - General Fund

From 10/1/2019 Through 12/31/2019

(In Whole Numbers)

	Total Budget - Original	Current Period Actual	Total Budget Variance - Original	Percent Total Budget Remaining - Original
<b>Revenues</b>				
Special Assessments - Service Charges				
Operations & Maintenance Assmts-Tax Roll	247,725	240,366	(7,359)	(3)%
Interest Earnings				
Interest Earnings	0	14	14	0 %
<b>Total Revenues</b>	<u>247,725</u>	<u>240,380</u>	<u>(7,345)</u>	<u>(3)%</u>
<b>Expenditures</b>				
Legislative				
Supervisor Fees	9,600	0	9,600	100 %
Financial & Administrative				
District Manager	33,750	8,438	25,313	75 %
District Engineer	5,000	0	5,000	100 %
Disclosure Report	4,200	0	4,200	100 %
Trustees Fees	5,000	417	4,583	92 %
Auditing Services	6,875	500	6,375	93 %
Postage, Phone, Faxes, Copies	3,500	14	3,486	100 %
Public Officials Insurance	2,200	2,050	150	7 %
Legal Advertising	2,500	341	2,159	86 %
Bank Fees	250	0	250	100 %
Dues, Licenses & Fees	200	175	25	13 %
Miscellaneous Fees	100	0	100	100 %
Office Supplies	250	0	250	100 %
Website Administration	4,000	1,990	2,010	50 %
Legal Counsel				
District Counsel	5,000	638	4,362	87 %
Electric Utility Services				
Electric Utility Services	77,300	11,229	66,071	85 %
Water-Sewer Combination Services				
Water Utility Services	6,000	286	5,714	95 %
Other Physical Environment				
Waterway Management Program	4,625	894	3,731	81 %
Property & Casualty Insurance	5,000	4,465	535	11 %
Entry & Walls Maintenance	0	1,450	(1,450)	0 %
Landscape Maintenance - Contract	55,000	14,978	40,022	73 %
Landscape Maintenance - Other	9,375	43	9,332	100 %
Plant Replacement Program	3,500	0	3,500	100 %
Irrigation Maintenance	4,500	50	4,450	99 %
<b>Total Expenditures</b>	<u>247,725</u>	<u>47,958</u>	<u>199,767</u>	<u>81 %</u>
<b>Excess Revenues Over (Under) Expenses</b>	<u>0</u>	<u>192,422</u>	<u>192,422</u>	<u>0 %</u>
<b>Fund Balance, Beginning of Period</b>				
Fund Balance-Unreserved	0	133,520	133,520	0 %
<b>Total Fund Balance, Beginning of Period</b>	<u>0</u>	<u>133,520</u>	<u>133,520</u>	<u>0 %</u>
<b>Fund Balance, End of Period</b>	<u>0</u>	<u>325,942</u>	<u>325,942</u>	<u>0 %</u>

# The Oaks at Shady Creek CDD

## Statement of Revenues and Expenditures

203 - Debt Service - Series 2015  
From 10/1/2019 Through 12/31/2019  
(In Whole Numbers)

	Total Budget - Original	Current Period Actual	Total Budget Variance - Original	Percent Total Budget Remaining - Original
Revenues				
Special Assessments - Capital Improvements				
Debt Service Assmts - Tax Roll	419,981	407,278	(12,703)	(3)%
Interest Earnings				
Interest Earnings	0	1,452	1,452	0 %
Total Revenues	419,981	408,730	(11,251)	(3)%
Expenditures				
Debt Service Payments				
Interest-Series 2015	289,982	147,178	142,804	49 %
Principal-Series 2015	130,000	125,000	5,000	4 %
Total Expenditures	419,982	272,178	147,804	35 %
Excess Revenues Over (Under) Expenses	(1)	136,552	136,553	(13,655,276)%
Fund Balance, Beginning of Period				
Fund Balance-All Other Reserves	0	415,384	415,384	0 %
Total Fund Balance, Beginning of Period	0	415,384	415,384	0 %
Fund Balance, End of Period	(1)	551,936	551,937	(55,193,700)%

# The Oaks at Shady Creek CDD

## Statement of Revenues and Expenditures

303 - Capital Project - Series 2015  
From 10/1/2019 Through 12/31/2019  
(In Whole Numbers)

	Total Budget - Original	Current Period Actual	Total Budget Variance - Original	Percent Total Budget Remaining - Original
Revenues				
Interest Earnings				
Interest Earnings	0	1	1	0 %
Total Revenues	0	1	1	0 %
Excess Revenues Over (Under)	0	1	1	0 %
Expenses				
Fund Balance, Beginning of Period				
Fund Balance-All Other Reserves				
	0	494	494	0 %
Total Fund Balance, Beginning of Period	0	494	494	0 %
Fund Balance, End of Period	0	495	495	0 %

The Oaks at Shady Creek CDD  
Reconcile Cash Accounts

Summary

Cash Account: 10101 Cash-Operating Account

Reconciliation ID: 12/31/2019

Reconciliation Date: 12/31/2019

Status: Locked

Bank Balance	716,048.70
Less Outstanding Checks/Vouchers	394,445.00
Plus Deposits in Transit	0.00
Plus or Minus Other Cash Items	0.00
Plus or Minus Suspense Items	<u>0.00</u>
Reconciled Bank Balance	321,603.70
Balance Per Books	<u>321,603.70</u>
Unreconciled Difference	<u><u>0.00</u></u>

Click the Next Page toolbar button to view details.



The Oaks at Shady Creek CDD  
Reconcile Cash Accounts

Detail

Cash Account: 10101 Cash-Operating Account

Reconciliation ID: 12/31/2019

Reconciliation Date: 12/31/2019

Status: Locked

Outstanding Checks/Vouchers

Document Number	Document Date	Document Description	Document Amount	Payee
1535	12/6/2019	Series 2015 FY20 Tax Dist ID 449	365,735.77	The Oaks at Shady Creek CDD
1537	12/12/2019	Series 2015 FY20 Tax Dist ID 451	28,223.98	The Oaks at Shady Creek CDD
1541	12/24/2019	System Generated Check/Voucher	485.25	Straley Robin Vericker
Outstanding Checks/Vouchers			394,445.00	

**The Oaks at Shady Creek CDD**  
**Reconcile Cash Accounts**

**Detail**

**Cash Account: 10101 Cash-Operating Account**

**Reconciliation ID: 12/31/2019**

**Reconciliation Date: 12/31/2019**

**Status: Locked**

**Cleared Checks/Vouchers**

<u>Document Number</u>	<u>Document Date</u>	<u>Document Description</u>	<u>Document Amount</u>	<u>Payee</u>
1519	10/22/2019	Series 2015 FY19 Tax Dist ID Ex Fees	3,551.19	The Oaks at Shady Creek CDD
1527	11/12/2019	Series 2015 FY20 Tax Dist ID 441	381.94	The Oaks at Shady Creek CDD
1531	11/20/2019	Series 2015 FY 20 Tax Dist ID 445	5,879.99	The Oaks at Shady Creek CDD
1534	11/22/2019	Series 2015 FY20 Tax Dist ID 447	7,056.00	The Oaks at Shady Creek CDD
1532	12/2/2019	System Generated Check/Voucher	138.17	BOCC
1533	12/2/2019	System Generated Check/Voucher	3,507.46	TECO
1536	12/12/2019	System Generated Check/Voucher	152.50	Straley Robin Vericker
1538	12/19/2019	System Generated Check/Voucher	50.00	Affordable Backflow Testing
1539	12/19/2019	System Generated Check/Voucher	4,721.00	Landcare Landscaping< Inc.
1540	12/24/2019	System Generated Check/Voucher	148.08	BOCC
1542	12/24/2019	System Generated Check/Voucher	3,507.65	TECO
Cleared Checks/Vouchers			29,093.98	

The Oaks at Shady Creek CDD  
Reconcile Cash Accounts

Detail

Cash Account: 10101 Cash-Operating Account

Reconciliation ID: 12/31/2019

Reconciliation Date: 12/31/2019

Status: Locked

Cleared Deposits

<u>Deposit Number</u>	<u>Document Number</u>	<u>Document Date</u>	<u>Document Description</u>	<u>Document Amount</u>
	CR180	12/4/2019	Tax Distribution - 12.04.19	581,584.24
	CR181	12/12/2019	Tax Distribution - 12.12.19	44,881.10
	CR183	12/31/2019	December Interest Income	<u>10.52</u>
Cleared Deposits				<u><u>626,475.86</u></u>

# SOLITUDE

LAKE MANAGEMENT



## Oaks at Shady Creek Waterway Inspection Report

---

**Reason for Inspection:** Scheduled-recurring

**Inspection Date:** 12/11/2019

**Prepared for:**

Mr. Brian Howell, District Manager  
c/o Meritus  
5680 West Cypress Street, #A  
Tampa, Florida 33607

**Prepared by:**

Peter Simoes, Account Representative/Biologist

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## Site: 1

### Comments:

Requires attention

Moderate algae and Slender Spikerush to be treated during upcoming visits. New growth of desirable Gulf Spikerush also present.

### Action Required:

Treat within 7 days

### Target:

Surface algae



December, 2019



December, 2019

## Site: 2

### Comments:

Site looks good

Minor Duckweed. Moderate Hog damage along slopes. Remediation advised.

### Action Required:

Routine maintenance next visit

### Target:

Floating Weeds



December, 2019



December, 2019

## Site: 3

### Comments:

Site looks good

Minor Pennywort. Substantial Hog damage. Remediation advised.

### Action Required:

Routine maintenance next visit

### Target:

Pennywort



December, 2019



December, 2019



## Site: 4N

### Comments:

Site looks good

Minimal Duckweed behind pod of Gulf Spikerush.

### Action Required:

Routine maintenance next visit

### Target:

Floating Weeds



December, 2019



December, 2019

## Site: 4S

### Comments:

Normal growth observed

Minor algae and debris.

### Action Required:

Routine maintenance next visit

### Target:

Surface algae



December, 2019



December, 2019

## Management Summary

The waterway inspection for Oaks at Shady Creek was completed on December 11th, 2019 for all ponds.

Pond #1: Substantial submersed weeds and algae developing above, which was treated during our routine visit on 12/16/2019. Positive submersed treatment results may be expected within 14-21 days following application.

Pond #2: New growth of the native plant species, Gulf Spikerush, was present along the perimeter, which improves nutrient filtration and soil stability. The minor normal growth of floating Duckweed was restricted to the buffers and will continue to be treated during our routine visits.

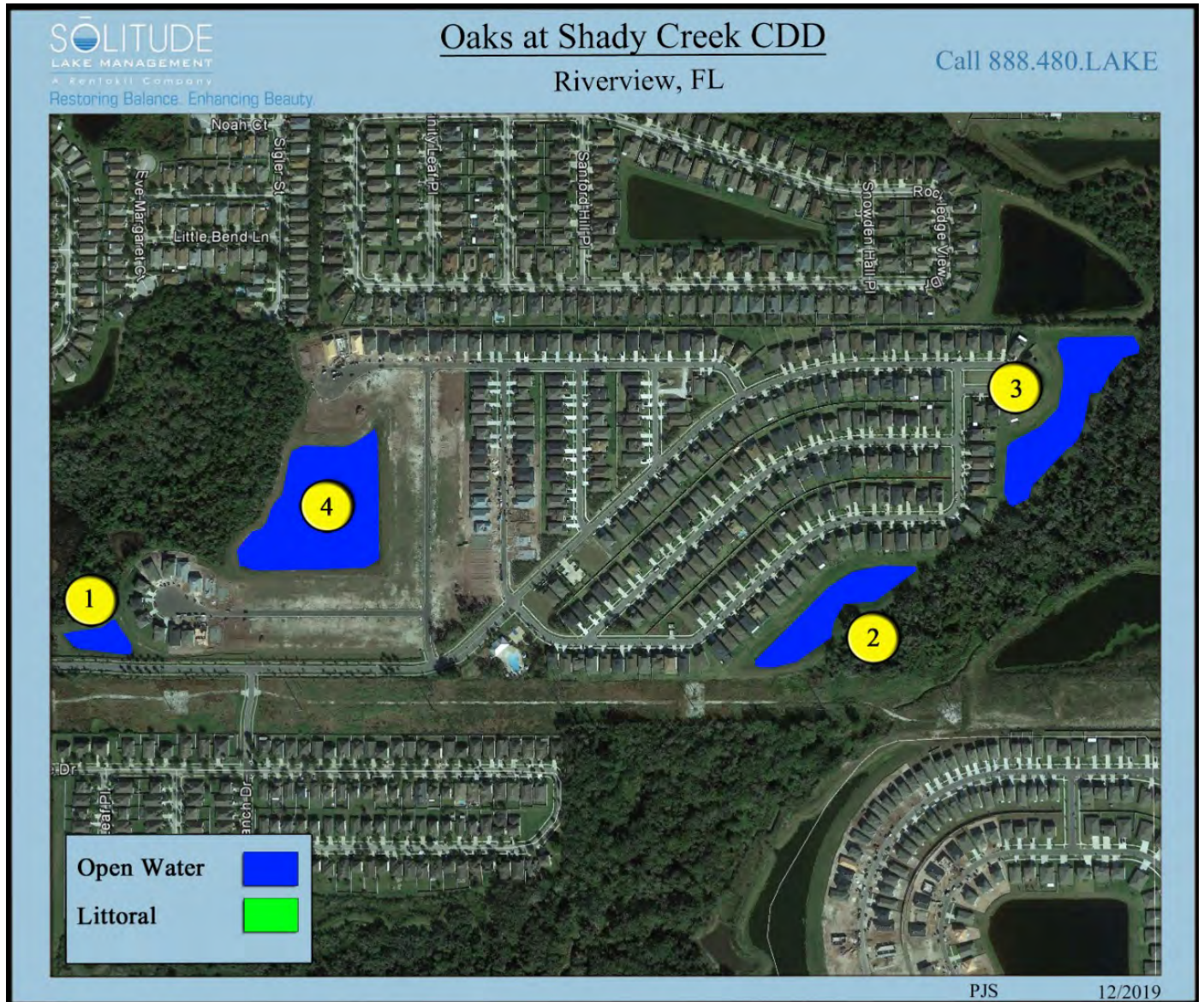
Pond #3: Overall, looks good. Minor Pennywort was noted extending from the pond banks into the open water, which will be targeted during our routine visits and positive results may be expected within 14-21 days following herbicide application.

Pond #4: Normal growth of algae and floating Duckweed were noted within the buffers of Gulf Spikerush. The nuisance weeds and algae will be treated during our upcoming scheduled visits.

NOTE: Substantial Hog damage was observed along the perimeter of Ponds #2 and #3. Remediation is advised.

Site	Comments	Target	Action Required
1	Requires attention	Surface algae	Treat within 7 days
2	Site looks good	Floating Weeds	Routine maintenance next visit
3	Site looks good	Pennywort	Routine maintenance next visit
4N	Site looks good	Floating Weeds	Routine maintenance next visit
4S	Normal growth observed	Surface algae	Routine maintenance next visit







# Meritus

## MONTHLY MAINTENANCE INSPECTION GRADESHEET

Site: The Oaks at Shady Creek

Date: 1/3/20

	MAXIMUM VALUE	CURRENT VALUE	CURRENT DEDUCTION	REASON FOR DEDUCTION
<b>AQUATICS</b>				
DEBRIS	25	20	-5	Pond banks are tore up from hogs.
INVASIVE MATERIAL (FLOATING)	20	20	0	Ponds are algae free
INVASIVE MATERIAL (SUBMERSED)	20	18	-2	Minor
FOUNTAINS/AERATORS	20	20	0	N/A
DESIRABLE PLANTS	15	15	0	Good

### AMENITIES

CLUBHOUSE INTERIOR	4	4	0	
CLUBHOUSE EXTERIOR	3	3	0	
POOL WATER	10	10	0	
POOL TILES	10	10	0	
POOL LIGHTS	5	5	0	
POOL FURNITURE/EQUIPMENT	8	8	0	
FIRST AID/SAFETY ITEMS	10	10	0	
SIGNAGE (rules, pool, playground)	5	5	0	
PLAYGROUND EQUIPMENT	5	5	0	
RECREATIONAL FACILITIES	7	7	0	
RESTROOMS	6	6	0	
HARDSCAPE	10	10	0	
ACCESS & MONITORING SYSTEM	3	3	0	
IT/PHONE SYSTEM	3	3	0	
TRASH RECEPTACLES	3	3	0	
WATER FOUNTAINS	8	8	0	

### MONUMENTS AND SIGNS

CLEAR VISIBILITY (Landscaping)	25	25	0	Good
PAINTING	25	25	0	Entrance sign was recently painted
CLEANLINESS	25	25	0	Good
GENERAL CONDITION	25	25	0	Good



## Meritus

### MONTHLY MAINTENANCE INSPECTION GRADESHEET

Site: The Oaks at Shady Creek

Date: 1/3/20

	MAXIMUM VALUE	CURRENT VALUE	CURRENT DEDUCTION	REASON FOR DEDUCTION
<b>HIGH IMPACT LANDSCAPING</b>				
ENTRANCE MONUMENT	40	35	-5	Snap Dragons need to be deadheaded
RECREATIONAL AREAS	30	25	-5	Pocket park is being over watered
SUBDIVISION MONUMENTS	30	30	0	
<b>HARDSCAPE ELEMENTS</b>				
WALLS/FENCING	15	15	0	Good
SIDEWALKS	30	30	0	Good
SPECIALTY MONUMENTS	15	15	0	Good
STREETS	25	25	0	County
PARKING LOTS	15	15	0	N/A
<b>LIGHTING ELEMENTS</b>				
STREET LIGHTING	33	33	0	?
LANDSCAPE UP LIGHTING	22	22	0	
MONUMENT LIGHTING	30	30	0	
AMENITY CENTER LIGHTING	15	15	0	
<b>GATES</b>				
ACCESS CONTROL PAD	25	25	0	N/A
OPERATING SYSTEM	25	25	0	N/A
GATE MOTORS	25	25	0	N/A
GATES	25	25	0	Ok
<b>SCORE</b>	700	683	-17	98%

Manager's Signature: Gene Roberts

Supervisor's Signature: \_\_\_\_\_



District Management Services, LLC

**MONTHLY LANDSCAPE MAINTENANCE INSPECTION GRADESHEET**

Site: The Oaks at Shady Creek

Date: Friday, January 03, 2020

	MAXIMUM VALUE	CURRENT VALUE	CURRENT DEDUCTION	REASON FOR DEDUCTION
<b>LANDSCAPE MAINTENANCE</b>				
TURF	5	3	-2	Dead turf along Purple Martin
TURF FERTILITY	10	10	0	Ok
TURF EDGING	5	5	0	Good
WEED CONTROL - TURF AREAS	5	3	-2	Broad leaf weeds
TURF INSECT/DISEASE CONTROL	10	10	0	None observed, brown patch has cleared up
PLANT FERTILITY	5	3	-2	Fair
WEED CONTROL - BED AREAS	5	4	-1	Some detailing needed
PLANT INSECT/DISEASE CONTROL	5	4	-1	Palm trees
PRUNING	10	9	-1	Hibiscus plants
CLEANLINESS	5	4	-1	Trash along Purple Martin
MULCHING	5	3	-2	Needs freshening
WATER/IRRIGATION MGMT	8	8	0	OK
CARRYOVERS	5	4	-1	Dead turf

**SEASONAL COLOR/PERENNIAL MAINTENANCE**

VIGOR/APPEARANCE	7	5	-2	Fair
INSECT/DISEASE CONTROL	7	7	0	
DEADHEADING/PRUNING	3	2	-1	Need deadheading

**SCORE**

100	84	-16	84%
-----	----	-----	-----

Contractor Signature: \_\_\_\_\_

Manager's Signature: GR

Supervisor's Signature: \_\_\_\_\_



The Oaks at Shady Creek January



The entrance sign has been painted.



The Snap dragons need to be dead headed.





Turf along Purple Martin needs to be treated for broad leaf weeds.



Several areas along the entrance boulevard need to be re-sodded. LandCare has been notified.





A few of the Sylvester palms continue to decline, will have them inoculated again.





The Hibiscus plants along Purple Martin are leggy. They need to be trimmed and treated with fungicide and foliar fertilizer.



Several landscape beds need weed detailing.





The sidewalk on Tropical Kingbird remains under the water. The neighboring lawn is saturated from being over watered. Land Care will provide proposal to add drains.



The Zoysia turf at the pocket park is being over watered and is saturated. Off color due to cooler temperatures.





The ponds are free from algae, some debris.



Despite traps being set, the hogs are still doing damage to the pond banks.



