

# **KOA BAY**

**COMMUNITY DEVELOPMENT  
DISTRICT**

**September 29, 2025**

**PUBLIC HEARING,  
REGULAR MEETING AND  
AUDIT COMMITTEE  
MEETING AGENDA**

**KOA BAY**  
**COMMUNITY DEVELOPMENT DISTRICT**

**AGENDA**  
**LETTER**

**Koa Bay Community Development District**  
**OFFICE OF THE DISTRICT MANAGER**  
**2300 Glades Road, Suite 410W•Boca Raton, Florida 33431**  
**Phone: (561) 571-0010•Toll-free: (877) 276-0889•Fax: (561) 571-0013**  
<https://koabaycdd.net/>

September 22, 2025

Board of Supervisors  
Koa Bay Community Development District

Dear Board Members:

The Board of Supervisors of the Koa Bay Community Development District will hold a Public Hearing, Regular Meeting and Audit Committee Meeting on September 29, 2025 at 10:00 a.m., at the Susan Broom Kilmer Branch Library, 101 Melody Lane, Fort Pierce, Florida 34950. The agenda is as follows:

1. Call to Order/Roll Call
2. Public Hearing on Adoption of Fiscal Year 2024/2025 Budget
  - A. Affidavit of Publication
  - B. Consideration of Resolution 2025-40, Relating to the Annual Appropriations and Adopting the Budget for the Fiscal Year Beginning October 1, 2024, and Ending September 30, 2025; Authorizing Budget Amendments; and Providing an Effective Date
3. Recess Regular Meeting/Commencement of Audit Selection Committee Meeting
4. Review of Responses to Request for Proposals (RFP) for Annual Audit Services
  - A. Affidavit of Publication
  - B. RFP Package
  - C. Respondent(s)
    - I. DiBartolomeo, McBee, Hartley & Barnes, P.A.
    - II. Grau & Associates
  - D. Auditor Evaluation Matrix/Ranking
5. Termination of Audit Selection Committee Meeting/Reconvene Regular Meeting
6. Consider Recommendation of Audit Selection Committee
  - Award of Contract/Engagement of Auditor
7. Consideration of Response(s) to Request for Qualifications (RFQ) for Engineering Services

**ATTENDEES:**

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

- A. Affidavit of Publication
  - B. RFQ Package
  - C. Respondent: *Captec Engineering, Inc.*
  - D. Competitive Selection Criteria/Ranking
  - E. Award of Contract
8. Consideration of Resolution 2025-09, Designating the Location of the Local District Records Office and Providing an Effective Date
  9. Acceptance of Unaudited Financial Statements as of August 31, 2025
  10. Approval of August 11, 2025 Public Hearing and Regular Meeting Minutes
  11. Staff Reports
    - A. District Counsel: *Kutak Rock LLP*
    - B. District Engineer (Interim): *Captec Engineering, Inc.*
    - C. District Manager: *Wrathell, Hunt and Associates, LLC*
- NEXT MEETING DATE: October 13, 2025 at 10:00 AM

○ QUORUM CHECK

SEAT 1	KATHARINA "KATHY" HOUSER	<input type="checkbox"/> IN PERSON	<input type="checkbox"/> PHONE	<input type="checkbox"/> NO
SEAT 2	JACOB WEBB	<input type="checkbox"/> IN PERSON	<input type="checkbox"/> PHONE	<input type="checkbox"/> NO
SEAT 3	JOSEPH "JOBY" SLAY, SR.	<input type="checkbox"/> IN PERSON	<input type="checkbox"/> PHONE	<input type="checkbox"/> NO
SEAT 4	RYAN PERNA	<input type="checkbox"/> IN PERSON	<input type="checkbox"/> PHONE	<input type="checkbox"/> NO
SEAT 5	ROLAND LABONTE	<input type="checkbox"/> IN PERSON	<input type="checkbox"/> PHONE	<input type="checkbox"/> NO

12. Board Members' Comments/Requests
13. Public Comments
14. Adjournment

Should you have any questions or concerns, please do not hesitate to contact me directly at (561) 346-5294 or Chris Conti at (724) 971-8827.

Sincerely,  
  
 Cindy Cerbone  
 District Manager

**FOR BOARD MEMBERS AND STAFF TO ATTEND BY TELEPHONE**  
**CALL-IN NUMBER: 1-888-354-0094**  
**PARTICIPANT PASSCODE: 801 901 3513**

**KOA BAY**  
**COMMUNITY DEVELOPMENT DISTRICT**

**2**

**KOA BAY**  
**COMMUNITY DEVELOPMENT DISTRICT**

**2A**

**AFFIDAVIT OF PUBLICATION**

Daphne Gillyard  
Koa Bay Community Development District  
2300 Glades RD # 410W  
Boca Raton FL 33431-8556


STATE OF WISCONSIN, COUNTY OF BROWN

Before the undersigned authority personally appeared, who on oath says that he or she is the Legal Advertising Representative of the Indian River Press Journal/St Lucie News Tribune/Stuart News, newspapers published in Indian River/St Lucie/Martin Counties, Florida; that the attached copy of advertisement, being a Legal Ad in the matter of Public Notices, was published on the publicly accessible websites of Indian River/St Lucie/Martin Counties, Florida, or in a newspaper by print in the issues of, on:

SCN StLucie-IndianRv-Stuart 09/09/2025, 09/16/2025  
SCN tcpalm.com 09/09/2025, 09/16/2025

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

Subscribed and sworn to before me, by the legal clerk, who is personally known to me, on 09/16/2025

\_\_\_\_\_  
Legal Clerk 

\_\_\_\_\_  
Notary, State of WI, County of Brown

8-25-26

My commission expires

Publication Cost: \$303.84  
Tax Amount: \$0.00  
Payment Cost: \$303.84  
Order No: 11647611 # of Copies:  
Customer No: 1488511 1  
PO #:

**THIS IS NOT AN INVOICE!**

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**MARIAH VERHAGEN**  
Notary Public  
State of Wisconsin

**NOTICE OF PUBLIC HEARING TO CONSIDER THE ADOPTION OF THE FISCAL YEAR 2025 PROPOSED BUDGET(S); AND NOTICE OF REGULAR BOARD OF SUPERVISORS' MEETING.**

The Board of Supervisors ("Board") of the Koa Bay Community Development District ("District") will hold a public hearing and regular meeting as follows:

DATE: September 29, 2025

TIME: 10:00 A.M.

LOCATION: Susan Broom Kilmer Branch Library  
101 Melody Lane  
Fort Pierce, Florida 34950

The purpose of the public hearing is to receive comments and objections on the adoption of the District's proposed budget(s) for the fiscal year beginning October 1, 2024, and ending September 30, 2025 ("Proposed Budget"). A regular Board meeting of the District will also be held at the above time where the Board may consider any other business that may properly come before it. A copy of the agenda and Proposed Budget may be obtained at the offices of the District Manager, Wrathell, Hunt and Associates, LLC, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431, Phone (561) 571-0010 ("District Manager's Office"), during normal business hours.

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

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

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

District Manager  
Pub: Sept 9 & 16, 2025  
TCN11647611

**KOA BAY**  
**COMMUNITY DEVELOPMENT DISTRICT**

**2B**



**RESOLUTION 2025-40**  
**[FY 2025 APPROPRIATION RESOLUTION]**

**THE ANNUAL APPROPRIATION RESOLUTION OF THE KOA BAY COMMUNITY DEVELOPMENT DISTRICT (“DISTRICT”) RELATING TO THE ANNUAL APPROPRIATIONS AND ADOPTING THE BUDGET FOR THE FISCAL YEAR BEGINNING OCTOBER 1, 2024, AND ENDING SEPTEMBER 30, 2025; AUTHORIZING BUDGET AMENDMENTS; AND PROVIDING AN EFFECTIVE DATE.**

**WHEREAS**, for the fiscal year beginning October 1, 2024, and ending September 30, 2025 (“**FY 2025**”), the District Manager prepared and submitted to the Board of Supervisors (“**Board**”) of the Koa Bay Community Development District (“**District**”) a proposed budget (“**Proposed Budget**”) along with an explanatory and complete financial plan for each fund of the District, pursuant to the provisions of Section 190.008(2)(a), *Florida Statutes*; and

**WHEREAS**, at least sixty (60) days prior to the adoption of the Proposed Budget, the District filed a copy of the Proposed Budget with the local general-purpose government(s) having jurisdiction over the area included in the District pursuant to the provisions of Section 190.008(2)(b), *Florida Statutes*; and

**WHEREAS**, the Board set a public hearing on the Proposed Budget and caused notice of such public hearing to be given by publication pursuant to Section 190.008(2)(a), *Florida Statutes*; and

**WHEREAS**, the District Manager posted the Proposed Budget on the District’s website in accordance with Chapter 189, *Florida Statutes*; and

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

**NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE KOA BAY COMMUNITY DEVELOPMENT DISTRICT:**

**SECTION 1. BUDGET**

- a. The Proposed Budget, attached hereto as **Exhibit A**, as amended by the Board, is hereby adopted in accordance with the provisions of Section 190.008(2)(a), *Florida Statutes* (“**Adopted Budget**”), and incorporated herein by reference; provided, however, that the comparative figures contained in the Adopted Budget may be subsequently revised as deemed necessary by the District Manager to reflect actual revenues and expenditures.

- b. The Adopted Budget, as amended, shall be maintained in the office of the District Manager and at the District's Local Records Office and identified as "The Budget for the Koa Bay Community Development District for the Fiscal Year Ending September 30, 2025."
- c. The Adopted Budget shall be posted by the District Manager on the District's official website in accordance with Chapter 189, *Florida Statutes* and shall remain on the website for at least two (2) years.

## **SECTION 2. APPROPRIATIONS**

There is hereby appropriated out of the revenues of the District, for FY 2025, the sum(s) set forth in **Exhibit A** to be raised by the levy of assessments and/or otherwise, which sum is deemed by the Board to be necessary to defray all expenditures of the District during said budget year, to be divided and appropriated as set forth in **Exhibit A**.

## **SECTION 3. BUDGET AMENDMENTS**

Pursuant to Section 189.016, *Florida Statutes*, the District at any time within FY 2025 or within 60 days following the end of the FY 2025 may amend its Adopted Budget for that fiscal year as follows:

- a. A line-item appropriation for expenditures within a fund may be decreased or increased by motion of the Board recorded in the minutes, and approving the expenditure, if the total appropriations of the fund do not increase.
- b. The District Manager or Treasurer may approve an expenditure that would increase or decrease a line-item appropriation for expenditures within a fund if the total appropriations of the fund do not increase and if either (i) the aggregate change in the original appropriation item does not exceed the greater of \$15,000 or 15% of the original appropriation, or (ii) such expenditure is authorized by separate disbursement or spending resolution.
- c. Any other budget amendments shall be adopted by resolution and consistent with Florida law. The District Manager or Treasurer must ensure that any amendments to the budget under this paragraph c. are posted on the District's website in accordance with Chapter 189, *Florida Statutes*, and remain on the website for at least two (2) years.

[REMAINDER OF PAGE INTENTIONALLY LEFT BLANK]

**SECTION 4. EFFECTIVE DATE.** This Resolution shall take effect immediately upon adoption.

**PASSED AND ADOPTED THIS 29<sup>TH</sup> DAY OF SEPTEMBER, 2025.**

ATTEST:

**KOA BAY COMMUNITY DEVELOPMENT  
DISTRICT**

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

\_\_\_\_\_  
Chair/Vice Chair, Board of Supervisors

**Exhibit A:** FY 2025 Budget

**Exhibit A:** FY 2025 Budget

**KOA BAY  
COMMUNITY DEVELOPMENT DISTRICT  
PROPOSED BUDGET  
FISCAL YEAR 2025**

**KOA BAY  
COMMUNITY DEVELOPMENT DISTRICT  
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**KOA BAY  
COMMUNITY DEVELOPMENT DISTRICT  
GENERAL FUND BUDGET  
FISCAL YEAR 2025**

	<u>Proposed Budget</u>
<b>REVENUES</b>	
Landowner contribution	\$ 88,182
Total revenues	<u>88,182</u>
<b>EXPENDITURES</b>	
<b>Professional &amp; administrative</b>	
Supervisors	5,000
Management/accounting/recording**	38,000
Legal	25,000
Engineering	2,000
Audit	-
Arbitrage rebate calculation*	-
Dissemination agent*	1,167
Trustee*	-
Telephone	200
Postage	500
Printing & binding	500
Legal advertising	7,500
Annual special district fee	175
Insurance	5,500
Contingencies/bank charges	750
Website hosting & maintenance	1,680
Website ADA compliance	210
Total expenditures	<u>88,182</u>
Excess/(deficiency) of revenues over/(under) expenditures	-
Fund balance - beginning (unaudited)	-
Fund balance - ending (projected)	-
Unassigned	-
Fund balance - ending	<u><u>\$ -</u></u>

\*These items will be realized when bonds are issued.

\*\*WHA will charge a reduced management fee of \$2,000 per month until bonds are issued.

**KOA BAY  
COMMUNITY DEVELOPMENT DISTRICT  
DEFINITIONS OF GENERAL FUND EXPENDITURES**

**EXPENDITURES**

**Professional & administrative**

Supervisors	\$ 5,000
Statutorily set at \$200 for each meeting of the Board of Supervisors not to exceed \$4,800 for each fiscal year.	
Management/accounting/recording**	38,000
<b>Wrathell, Hunt and Associates, LLC</b> (WHA), specializes in managing community development districts by combining the knowledge, skills and experience of a team of professionals to ensure compliance with all of the District's governmental requirements. WHA develops financing programs, administers the issuance of tax exempt bond financings, operates and maintains the assets of the community.	
Legal	25,000
General counsel and legal representation, which includes issues relating to public finance, public bidding, rulemaking, open meetings, public records, real property dedications, conveyances and contracts.	
Engineering	2,000
The District's Engineer will provide construction and consulting services, to assist the District in crafting sustainable solutions to address the long term interests of the community while recognizing the needs of government, the environment and maintenance of the District's facilities.	
Audit	-
Statutorily required for the District to undertake an independent examination of its books, records and accounting procedures.	
Arbitrage rebate calculation*	-
To ensure the District's compliance with all tax regulations, annual computations are necessary to calculate the arbitrage rebate liability.	
Dissemination agent*	1,167
The District must annually disseminate financial information in order to comply with the requirements of Rule 15c2-12 under the Securities Exchange Act of 1934. Wrathell, Hunt & Associates serves as dissemination agent.	
Trustee*	-
Debt service fund accounting*	-
Telephone	200
Postage	500
Telephone and fax machine.	
Printing & binding	500
Mailing of agenda packages, overnight deliveries, correspondence, etc.	
Legal advertising	7,500
Letterhead, envelopes, copies, agenda packages	
Annual special district fee	175
The District advertises for monthly meetings, special meetings, public hearings, public bids, etc.	
Insurance	5,500
Contingencies/bank charges	750
Bank charges and other miscellaneous expenses incurred during the year and automated AP routing etc.	
Website hosting & maintenance	1,680
Website ADA compliance	210
Total expenditures	<u><u>\$ 88,182</u></u>

\*These items will be realized when bonds are issued.

\*\*WHA will charge a reduced management fee of \$2,000 per month until bonds are issued.



**KOA BAY**  
**COMMUNITY DEVELOPMENT DISTRICT**

**4**

**KOA BAY**  
**COMMUNITY DEVELOPMENT DISTRICT**

**4A**



Florida

PO Box 631244 Cincinnati, OH 45263-1244

GANNETT

**AFFIDAVIT OF PUBLICATION**

Daphne Gillyard  
Koa Bay Community Development District  
2300 Glades RD # 410W  
Boca Raton FL 33431-8556

KOA BAY COMMUNITY DEVELOPMENT DISTRICT  
REQUEST FOR PROPOSALS FOR ANNUAL AUDIT SERVICES  
The Koa Bay Community Development District hereby requests proposals for annual financial auditing services. The proposal must provide for the auditing of the District's financial records for the fiscal year ending September 30, 2025, with an option for additional annual renewals, subject to mutual agreement by both parties. The District is a local unit of special-purpose government created under Chapter 190, Florida Statutes, for the purpose of financing, constructing, and maintaining public infrastructure. The District is located in St. Lucie County, Florida, and has an annual operating budget of approximately \$88,182. The final contract will require that, among other things, the audit for the fiscal year ending September 30, 2025, be completed no later than June 30, 2026. The auditing entity submitting a proposal must be duly licensed under Chapter 473, Florida Statutes, and be qualified to conduct audits in accordance with "Government Auditing Standards," as adopted by the Florida Board of Accountancy. Audits shall be conducted in accordance with Florida Law and particularly Section 218.39, Florida Statutes, and the rules of the Florida Auditor General. Proposal packages, which include evaluation criteria and instructions to proposers, are available from the District Manager at the address and telephone number listed below. Proposers must provide one (1) electronic and one (1) unbound copy of their proposal to the District Manager, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431, (561) 571-0010 in an envelope marked on the outside "Auditing Services, Koa Bay Community Development District." Proposals must be received by 12:00 p.m. on August 15, 2025, at the office of the District Manager. Please direct all questions regarding this Notice to the District Manager.  
District Manager  
PUB 8/6/2025  
TCN 11553321

STATE OF WISCONSIN, COUNTY OF BROWN

Before the undersigned authority personally appeared, who on oath says that he or she is the Legal Advertising Representative of the Indian River Press Journal/St Lucie News Tribune/Stuart News, newspapers published in Indian River/St Lucie/Martin Counties, Florida; that the attached copy of advertisement, being a Legal Ad in the matter of Bids & Proposals, was published on the publicly accessible websites of Indian River/St Lucie/Martin Counties, Florida, or in a newspaper by print in the issues of, on:

08/06/2025

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

Subscribed and sworn to before me, by the legal clerk, who is personally known to me, on 08/06/2025

Legal Clerk

Notary, State of WI, County of Brown

3.7.27

My commission expires

Publication Cost: \$127.44  
Tax Amount: \$0.00  
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KAITLYN FELTY  
Notary Public  
State of Wisconsin



**KOA BAY**  
**COMMUNITY DEVELOPMENT DISTRICT**

**4B**

**KOA BAY COMMUNITY DEVELOPMENT DISTRICT  
REQUEST FOR PROPOSALS FOR ANNUAL AUDIT SERVICES**

The Koa Bay Community Development District hereby requests proposals for annual financial auditing services. The proposal must provide for the auditing of the District's financial records for the fiscal year ending September 30, 2025, with an option for additional annual renewals, subject to mutual agreement by both parties. The District is a local unit of special-purpose government created under Chapter 190, *Florida Statutes*, for the purpose of financing, constructing, and maintaining public infrastructure. The District is located in St. Lucie County, Florida, and has an annual operating budget of approximately \$88,182. The final contract will require that, among other things, the audit for the fiscal year ending September 30, 2025, be completed no later than June 30, 2026.

The auditing entity submitting a proposal must be duly licensed under Chapter 473, *Florida Statutes*, and be qualified to conduct audits in accordance with "Government Auditing Standards," as adopted by the Florida Board of Accountancy. Audits shall be conducted in accordance with Florida Law and particularly Section 218.39, *Florida Statutes*, and the rules of the Florida Auditor General.

Proposal packages, which include evaluation criteria and instructions to proposers, are available from the District Manager at the address and telephone number listed below.

Proposers must provide one (1) electronic and one (1) unbound copy of their proposal to the District Manager, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431, (561) 571-0010 in an envelope marked on the outside "Auditing Services, Koa Bay Community Development District." Proposals must be received by 12:00 p.m. on August 15, 2025, at the office of the District Manager. Please direct all questions regarding this Notice to the District Manager.

District Manager

**Koa Bay Community Development District**

**Request for Proposals**

**District Auditing Services for Fiscal Year 2025**

St. Lucie County, Florida

**INSTRUCTIONS TO PROPOSERS**

**SECTION 1. DUE DATE.** Sealed proposals must be received no later than **August 15, 2025 at 12:00 p.m.**, at the offices of District Manager, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431, (561) 571-0010. Proposals will be publicly opened at that time.

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

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

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

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

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

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

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

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

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

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

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

- A. List the position or title of all personnel to perform work on the District audit. Include resumes for each person listed; list years of experience in present position for each party listed and years of related experience.
- B. Describe proposed staffing levels, including resumes with applicable certifications.
- C. Three references from projects of similar size and scope. The Proposer should include information relating to the work it conducted for each reference as well as a name, address and phone number of a contact person.
- D. The lump sum cost of the provision of the services under the proposal for the District's first audit for which there are no special assessment bonds, plus the lump sum cost of two (2) annual renewals, which renewals shall include services related to the District's anticipated issuance of special assessment bonds.

**SECTION 13. PROTESTS.** In accordance with the District's Rules of Procedure, any protest regarding the Proposal Documents, must be filed in writing, at the offices of the

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

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



**KOA BAY COMMUNITY DEVELOPMENT DISTRICT  
AUDITOR SELECTION  
EVALUATION CRITERIA**

**1. Ability of Personnel. (20 Points)**

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

**2. Proposer's Experience. (20 Points)**

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

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

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

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

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

**5. Price. (20 Points)\*\*\***

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

**Total (100 Points)**

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

**KOA BAY**  
**COMMUNITY DEVELOPMENT DISTRICT**

**4C**

**KOA BAY**  
**COMMUNITY DEVELOPMENT DISTRICT**

**4CI**

# **Koa Bay Community Development District**

<b>Proposer</b>
-----------------

**DiBartolomeo, McBee, Hartley & Barnes, P.A.  
Certified Public Accountants**

**2222 Colonial Road, Suite 200  
Fort Pierce, Florida 34950  
(772) 461-8833**

**591 SE Port St. Lucie Boulevard  
Port Saint Lucie, Florida 34984  
(772) 878-1952**

**Contact:**

**Jim Hartley, CPA  
Principal**

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Koa Bay  
Community Development District  
Audit Selection Committee

Dear Committee Members:

We are pleased to have this opportunity to present the qualifications of DiBartolomeo, McBee, Hartley & Barnes, P.A. (DMHB) to serve as Koa Bay Community Development District's independent auditors. The audit is a significant engagement demanding various professional resources, governmental knowledge and expertise, and, most importantly, experience serving Florida local governments. DMHB understands the services required and is committed to performing these services within the required time frame. We have the staff available to complete this engagement in a timely fashion. We audit several entities across the State making it feasible to schedule and provide services at the required locations.

***Proven Track Record***—Our clients know our people and the quality of our work. We have always been responsive, met deadlines, and been willing to go the extra mile with the objective of providing significant value to mitigate the cost of the audit. This proven track record of successfully working together to serve governmental clients will enhance the quality of services we provide.

***Experience***—DMHB has a history of providing quality professional services to an impressive list of public sector clients in Florida. We currently serve a large number of public sector entities in Florida, including cities, villages, special districts, as well as a large number of community development districts. Our firm has performed in excess of 100 community development district audits. In addition, our senior management team members have between 25 and 35 years experience in serving Florida governments. DMHB is a recognized leader in providing services to governmental and non-profit agencies within the State of Florida. Through our experience in performing audits, we have been able to increase our audit efficiency and therefore reduce cost. We have continually passed this cost saving on to our clients and will continue to do so in the future. As a result of our experience and expertise, we have developed an effective and efficient audit approach designed to meet or exceed the performance specifications in accordance with audit standards generally accepted in the United States of America, the standards applicable to financial audits contained in Government Auditing Standards, issued by the Comptroller General of the United States with minimal disruption to your operations. Our firm has frequent technical updates to keep our personnel informed and up to date on all changes that are occurring within the industry.

***Timeliness*** – In order to meet the Districts needs, we will perform interim internal control testing by January 31<sup>st</sup> from unaudited preliminary general ledgers provided. The remaining testing will be completed no later than May 1<sup>st</sup>. We will also review all minutes and subsequent needs related to the review of the minutes by January 31st. Follow up review will be completed as necessary.

***Communication and Knowledge Sharing***— Another driving force behind our service approach is frequent, candid and open communication with management with no surprises. During the course of the audit, we will communicate with management on a regular basis to provide you with a status report on the audit and to discuss any issues that arise, potential management letter comments, or potential audit differences.

In the accompanying proposal, you will find additional information upon which you can evaluate DMHB's qualifications. Our full team is in place and waiting to serve you. Please contact us at 2222 Colonial Road, Suite 200 Fort Pierce, FL 34950. Our phone number is (772) 461-8833. We look forward to further discussion on how our team can work together with you.

Very truly yours,

A handwritten signature in black ink that reads "DiBartolomeo, McBee, Hartley & Barnes". The signature is written in a cursive, flowing style.

DiBartolomeo, McBee, Hartley & Barnes, P.A.

## PROFESSIONAL QUALIFICATIONS

DiBartolomeo, McBee, Hartley & Barnes, P.A. is a local public accounting firm with offices in the cities of Fort Pierce and Port St. Lucie. The firm was formed in 1982.

### ➤ *Professional Staff Resources*

Our services will be delivered through personnel in both our Port St. Lucie and Ft. Pierce offices, located at 591 S.E. Port St. Lucie Blvd., Port St. Lucie, FL 34984 and 2222 Colonial Road, Suite 200, Fort Pierce, Florida 34950, respectively. DMHB has a total of 19 professional staff including 9 with extensive experience serving governmental entities.

<b>Professional Staff Classification</b>	<b>Number of Professionals</b>
Partner	4
Managers	2
Senior	2
Staff	11
	19

DiBartolomeo, McBee, Hartley & Barnes provides a variety of accounting, auditing, tax litigation support, estate planning, and consulting services. Some of the governmental, non-profit accounting, auditing and advisory services currently provided to clients include:

- Annual financial and compliance audits including Single Audits of State and Federal financial assistance programs under the OMB A-133 audit criteria
- Issuance of Comfort Letters, consent letters, and parity certificates in conjunction with the issuance of tax-exempt debt obligations, including compiling financial data and interim period financial statement reviews
- Assisting in compiling historical financial data for first-time and subsequent submissions for the GFOA Certificate of Achievement for Excellence in Financial Reporting



## PROFESSIONAL QUALIFICATIONS (CONTINUED)

### ➤ *Professional Staff Resources (Continued)*

- Audits of franchise fees received from outside franchisees
- Preparation of annual reports to the State Department of Banking and Finance
- Audits of Internal Controls – Governmental Special Project
- Assistance with Implementation of current GASB pronouncements

### ➤ *Current and Near Future Workload*

In order to better serve and provide timely and informative financial data, we have comprised an experienced audit team. Our present and future workloads will permit the proposed audit team to perform these audits within the time schedule required and meet all deadlines.

### ➤ *Identification of Audit Team*

The team is composed of people who are experienced, professional, and creative. They fully understand your business and will provide you with reliable opinions. In addition, they will make a point to maintain ongoing dialogue with each other and management about the status of our services.

The auditing firm you select is only as good as the people who serve you. We are extremely proud of the outstanding team we have assembled for your engagement. Our team brings many years of relevant experience coupled with the technical skill, knowledge, authority, dedication, and most of all, the commitment you need to meet your government reporting obligations and the challenges that will result from the changing accounting standards.

A flow chart of the audit team and brief resumes detailing individual team members' experience in each of the relevant areas follow.

**Jim Hartley, CPA** – Engagement Partner (resume attached)  
Will assist in the field as main contact

**Jay McBee, CPA** – Technical Reviewer (resume attached)

**Christine Kenny, CPA** – Senior (resume attached)

# **Jim Hartley**

*Partner – DiBartolomeo, McBee, Hartley & Barnes*

## **Experience and Training**

Jim has over 35 years of public accounting experience and would serve as the engagement partner. His experience and training include:

- 35 years of non-profit and governmental experience.
- Specializing in serving entities ranging from Government to Associations and Special District audits.
- Has performed audits and advisory services for a variety of public sector entities.
- Has extensive experience performing audits of federal grant recipients in accordance with the Single Audit Act and the related Office of Management and Budget (OMB) guidelines.
- Experienced in maintaining the GFOA Certificate of Achievement.
- 120 hours of CPE credits over the past 3 years.

## **Recent Engagements**

Has provided audit services on governmental entities including towns, villages, cities, counties, special districts and community development districts. Jim has assisted with financial statement preparation, system implementation, and a variety of services to a wide range of non-profit and governmental entities. Jim currently provides internal audit and consulting services to governmental entities and non-profit agencies to assist in implementing and maintaining “best practice” accounting policies and procedures. Jim provides auditing services to the Fort Pierce Utilities Authority, St. Lucie County Fire District, City of Port St. Lucie, Tradition CDD #1 – 10, Southern Groves CDD #1-6, Multiple CDD audits, Town of St. Lucie Village, Town of Sewall’s Point, Town of Jupiter Island along with several other entities, including Condo and Homeowner Associations.

## **Education and Registrations**

- Bachelor of Science in Accounting – Sterling College.
- Certified Public Accountant

## **Professional Affiliations**

- Member of the American Institute of Certified Public Accountants
- Member of the Florida Institute of Certified Public Accountants
- Member of the Florida Government Finance Officers Association

## **Volunteer Service**

- Treasurer & Executive Board - St. Lucie County Chamber of Commerce
- Budget Advisory Board - St. Lucie County School District
- Past Treasurer - Exchange Club for Prevention of Child Abuse & Exchange Foundation Board
- Board of Directors – State Division of Juvenile Justice

## **Jay L. McBee**

*Partner – DiBartolomeo, McBee, Hartley & Barnes*

### **Experience and Training**

Jay has over 45 years of public accounting experience and would serve as the technical reviewer on the audit. His experience and training include:

- 45 years of government experience.
- Specializing in serving local government entities.
- Has performed audits and advisory services for a variety of public sector entities including counties, cities, special districts, and school districts.
- Has experience performing audits of federal grant recipients in accordance with the Single Audit Act and the related Office of Management and Budget (OMB) guidelines, including Circular A-133 and the Rules of the Auditor General.
- Has extensive experience in performing pension audits.
- Experienced in developing and maintaining the GFOA Certificate of Achievement.
- 120 Hours of relevant government CPE credits over the past 3 years.
- Experience in municipal bond and other governmental-financing options and offerings.

### **Recent Engagements**

Has provided auditing services on local governmental entities including towns, villages, cities, counties, special district and community development districts. Jay has assisted with financial preparation, system implementation, and a variety of government services to a wide range of governmental entities. Jay currently provides auditing services to the City of Port St. Lucie, City of Okeechobee Pension Trust Funds, St. Lucie County Fire District Pension funds, along with several other non-profit and governmental entities.

### **Education and Registrations**

- Bachelor of Science in Accounting and Quantitative Business Management – West Virginia University.
- Certified Public Accountant

### **Professional Affiliations**

- Member of the American Institute of Certified Public Accountants
- Member of the Florida Institute of Certified Public Accountants
- Member of the Florida Government Finance Officers Association

### **Volunteer Service**

- Member of the St. Lucie County Citizens Budget Committee
- Finance committee for the First United Methodist Church
- Treasurer of Boys & Girls Club of St. Lucie County

## **Christine M. Kenny, CPA**

*Senior Staff – DiBartolomeo, McBee, Hartley & Barnes*

### **Experience and training**

Christine has over 18 years of public accounting experience and would serve as a senior staff for the Constitutional Officers. Her experience and training include:

- 18 years of manager and audit experience.
- Has performed audits and advisory services for a variety of public sector entities including counties, cities, towns and special districts.
- Has experience performing audits of federal grant recipients in accordance with the Single Audit Act and the related Office of Management and Budget (OMB) guidelines, including Circular A-133 and the Rules of the Auditor General.
- 100 hours of relevant government CPE credits over the past 3 years.

### **Recent Engagements**

Has provided audit services on governmental entities including towns, villages, cities and special districts. Christine has assisted with financial statement preparation, system implementation, and a variety of services to a wide range of non-profit and governmental entities. Christine currently provides services to multiple agencies to assist in implementing and maintaining “best practice” accounting policies and procedures. Engagements include St. Lucie County Fire District, City of Fort Pierce, Town of Sewall’s Point, and Town of St. Lucie Village.

### **Education and Registrations**

- Bachelor of Science in Accounting – Florida State University
- Professional Affiliations
- Active Member of the Florida Institute of Certified Public Accountants
- Active Member of the American Institute of Certified Public Accountants
- Member of the Florida Government Finance Officers Association

## PROFESSIONAL QUALIFICATIONS (CONTINUED)

### ➤ *Governmental Audit Experience*

DiBartolomeo, McBee, Hartley & Barnes, P.A., through its principals and members, has provided continuous in-depth professional accounting, auditing, and consulting services to local government units, nonprofit organizations, and commercial clients. Our professionals have developed considerable expertise in performing governmental audits and single audits and in preparing governmental financial statements in conformance with continually evolving GASB pronouncements, statements, and interpretations. All of the public sector entities we serve annually are required to be in accordance with GASB pronouncements and government auditing standards. We currently perform several Federal and State single audits in compliance with OMB Circular A-133 and under the Florida Single Audit Act. Our professionals are also experienced in assisting their clients with preparing Comprehensive Annual Financial Reports (GFOA).

All work performed by our firm is closely supervised by experienced certified public accountants. Only our most seasoned CPA's perform consulting services. Some of the professional accounting, auditing, and management consulting services currently provided to our local governmental clients include:

- Annual financial and compliance audits including Single Audits of State and Federal financial assistance programs under OMB A-133 audit criteria and the Florida Single Audit Act
- Assisting in compiling historical financial data for first-time and supplemental submissions for GFOA Certificate of Achievement of Excellence in Financial Reporting
- Audits of franchise fees received from outside franchisees
- Assistance with Implementation of GASB-34
- Internal audit functions
- Fixed assets review and updating cost/depreciation allocations and methods

## ADDITIONAL DATA

### ➤ *Procedures for Ensuring Quality Control & Confidentiality*

Quality control in any CPA firm can never be taken for granted. It requires a continuing commitment to professional excellence. DiBartolomeo, McBee, Hartley & Barnes is formally dedicated to that commitment.

In an effort to continue to maintain the standards of working excellence required by our firm, DiBartolomeo, McBee, Hartley & Barnes, P.A. joined the Quality Review Program of the American Institute of Certified Public Accountants. To be a participating member firm, a firm must obtain an independent compliance review of its quality control policies and procedures to ascertain the firm's compliance with existing auditing standards on the applicable engagements. The scope of peer review is comprehensive in that it specifically reviews the following quality control policies and procedures of the participating firm:

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

### ➤ *Independence*

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

Our firm has provided continuous certified public accounting services in the government sector for 31 years, and we are independent of the Community Development Districts as defined by the following rules, regulations, and standards:

## ADDITIONAL DATA (CONTINUED)

### ➤ *Independence (Continued)*

- Au Section 220 – Statements on Auditing Standards issued by the American Institute of Certified Public Accountants
- ET Sections 101 and 102 – Code of Professional Conduct of the American Institute of Certified Public Accountants
- Chapter 21A-21, Florida Administrative Code
- Section 473.315, Florida Statutes
- Government Auditing Standards, issued by the Comptroller General of the United States

### ➤ *Computer Auditing Capabilities*

DiBartolomeo, McBee, Hartley & Barnes' strong computer capabilities as demonstrated by our progressive approach to computer auditing and extensive use of microcomputers. Jay McBee is the MIS partner for DMHB. Jay has extensive experience in auditing and evaluating various computer systems and would provide these services in this engagement.

We view the computer operation as an integral part of its accounting systems. We would evaluate the computer control environment to:

- Understand the computer control environment's effect on internal controls
- Conclude on whether aspects of the environment require special audit attention
- Make preliminary determination of comments for inclusion in our management letter

*This evaluation includes:*

- System hardware and software
- Organization and administration
- Access

## Contracts of Similar Nature within References

Client	Years	Annual Audit In Accordance With GAAS	Engagement Partner	Incl. Utility Audit/ Consulting	GFOA Cert.	GASB 34 Implementation & Assistance	Total Hours
St. Lucie County Fire District Karen Russell, Clerk-Treasurer (772)462-2300	1984 - Current	√	<b>Jim Hartley</b>			√	<b>250-300</b>
City of Fort Pierce Johnna Morris, Finance Director (772)-460-2200	2005-current	√	<b>Mark Barnes</b>		√	√	<b>800</b>
Fort Pierce Utilities Authority Nina Hurtubise, Finance Director (772)-466-1600	2005-current	√	<b>Jim Hartley</b>	√	√	√	<b>600</b>
Town of St. Lucie Village Diane Robertson, Town Clerk (772) 595-0663	1999 – current	√	<b>Jim Hartley</b>			√	<b>100</b>
City of Okeechobee Pension Trust Funds Marita Rice, Supervisor of Finance (863)763-9460	1998 – current	√	<b>Jay McBee</b>				<b>60</b>
St. Lucie County Fire District 175 Pension Trust Fund Chris Bushman , Captain (772) 462-2300	1990 – current	√	<b>Jay McBee</b>				<b>60</b>
Tradition Community Development District 1-10 Alan Mishlove, District Finance Manager (407)382-3256	2002 - current	√	<b>Jim Hartley</b>			√	<b>350</b>
Legends Bay Community Development District Patricia Comings-Thibault (321)263-0132	2013-current	√	<b>Jim Hartley</b>				<b>50</b>
Union Park Community Development District Patricia Comings-Thibault (321)263-0132	2013-current	√	<b>Jim Hartley</b>				<b>50</b>
Deer Island Community Development District Patricia Comings-Thibault (321)263-0132	2013-current	√	<b>Jim Hartley</b>				<b>50</b>
Park Creek Community Development District Patricia Comings-Thibault (321)263-0132	2013-current	√	<b>Jim Hartley</b>				<b>50</b>
Waterleaf Community Development District Patricia Comings-Thibault (321)263-0132	2013-current	√	<b>Jim Hartley</b>				<b>50</b>



## TECHNICAL APPROACH

### **a. *An Express Agreement to Meet or Exceed the Performance Specifications.***

1. The audit will be conducted in compliance with the following requirements:
  - a. Rules of the Auditor General for form and content of governmental audits
  - b. Regulations of the State Department of Banking and Finance
  - c. Audits of State and Local Governmental Units-American Institute of Certified Public Accountants.
2. The audit report shall contain the opinion of the auditor in reference to all financial statements, and an opinion reflecting compliance with applicable legal provisions.
3. We will also provide the required copies of the audit report, the management letter, any related reports on internal control weaknesses and one copy of the adjusting journal entries and financial work papers.
4. The auditor shall, at no additional charge, make all related work papers available to any Federal or State agency upon request in accordance with Federal and State Laws and Regulations.
5. We will work in cooperation with the District, its underwriters and bond council in regard to any bond issues that may occur during the term of the contract.
6. The financial statements shall be prepared in conformity with Governmental Accounting Standards Board Statement Number 34, 63 and 65.

We will commit to issuing the audit for each Fiscal year by June 1<sup>st</sup> of the following year. In order to ensure this we will perform interim internal control testing as required by January 31<sup>st</sup> from unaudited preliminary general ledgers provided. The remaining testing will be completed no later than May 1<sup>st</sup>. We will also review all minutes and subsequent needs related to the review of the minutes by January 30<sup>th</sup>. Follow up review will be completed as necessary.



**b. SPECIFIC AUDIT APPROACH**

**Our partners are not strangers who show up for an entrance conference and an exit conference.** We have developed an audit plan that allows the partners to directly supervise our staff in the field. By assigning two partners to the audit, we will have a partner on-site for a significant portion of the fieldwork. This also gives the District an additional contact individual for questions or problems that may arise during the audit.

The scope of our services will include a financial, as well as, a compliance audit of the District's financial statements. Our audit will be conducted in accordance with auditing standards generally accepted in the United States and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Additionally, our audit will be conducted in accordance with the provisions of Chapter 10.550, Rules of the Auditor General, which govern the conduct of local government entity audits performed in the State of Florida.

Our audit approach places emphasis on the accounting information system and how the data is recorded, rather than solely on the verification of numbers on a financial statement. This approach enables us to:

- Maximize our understanding of the District's operating environment
- Minimize time required conducting the audit since we start with broad considerations and narrow to specific audit objectives in critical areas

Our audit approach consists of four phases encompassing our audit process:

- Planning Phase
- Detailed Audit Phase
- Closing Phase
- Reporting

**Planning Phase**

**Meetings and Expectations:**

Our first step in this phase will be to set up a planning meeting with the financial and operating management of Koa Bay Community Development District. Our goal here is to eliminate "surprises." By meeting with responsible officials early on we can discuss significant accounting policies, closing procedures and timetables, planned timing of our audit procedures and expectations of our work. This will also be the starting point for our discussions with management related to *SAS No. 99-Consideration of Fraud in a Financial Statement Audit*. Inquiries will be made regarding managements knowledge of fraud and on management's views regarding the risk of fraud.

## **Review Operations and Develop Engagement Plan**

It is critical that we understand the District's operating environment. To do this we will obtain and review such items as, organizational charts, recent financial statements, budget information, major contracts and lease agreements. We will also gather other information necessary to increase our understanding of the District's operations, organization, and internal control.

## **Study and Evaluate Internal Control**

As part of general planning, we will obtain an understanding and assessment of the District's control environment. This assessment involves a review of management's operating style, written internal control procedures, and the District's accounting system. The assessment is necessary to determine if we can rely on control procedures and thus reduce the extent of substantive testing.

We then test compliance with established control procedures by ascertaining that the significant strengths within the system are functioning as described to us. Generally, transactions are selected and reviewed in sufficient detail to permit us to formulate conclusions regarding compliance with control procedures and the extent of operation compliance with pertinent laws and regulations. This involves gaining an understanding of the District's procedures, laws and regulations, and testing systems for compliance by examining contracts, invoices, bid procedures, and other documents. After testing controls, we then evaluate the results of those tests and decide whether we can rely on controls and thus reduce other audit procedures.

## **Conduct Preliminary Analytical Review**

Also during the planning stage, we undertake analytical procedures that aid us in focusing our energies in the right direction. We call these analytical reviews.

A properly designed analytical review can be a very effective audit procedure in audits of governmental units. Analytical reviews consist of more than just a comparison of current-year actual results to prior-year actual results. Very effective analytical review techniques include trend analysis covering a number of years and comparisons of information not maintained totally within the financial accounting system, such as per capita information, prevailing market interest rates, housing statistics, etc.

Some examples of effective analytical reviews performed together and/or individually include:

- Comparison of current-year actual results with current-year budget for the current and past years with investigation of significant differences and/or trends
- Trend analysis of the percentage of current-year revenues to current-year rates for the current and previous years with investigation of significant changes in the collection percentage
- Trend analysis of the percentage of expenditures by function for the current and previous years with investigation of significant changes in percentages by department
- Monthly analysis of receipts compared to prior years to detect trends that may have audit implications

Conclusions reached enable us to determine the nature, timing and extent of other substantive procedures.

## Detailed Audit Phase

### **Conduct Final Risk Assessment and Prepare Audit Programs**

Risk assessment requires evaluating the likelihood of errors occurring that could have a material affect on the financial statements being audited. The conclusions we reach are based on many evaluations of internal control, systems, accounts, and transactions that occur throughout the audit. After evaluating the results of our tests of control and our final risk assessment we can develop detailed audit programs.

### **Perform Substantive Tests of Account Balances**

These tests are designed to provide reasonable assurance as to the validity of the information produced by the accounting system. Substantive tests involve such things as examining invoices supporting payments, confirmation of balances with independent parties, analytical review procedures, and physical inspection of assets. All significant accounts will be subjected to substantive procedures. Substantive tests provide direct evidence of the completeness, accuracy, and validity of data.

### **Perform Single Audit Procedures (if applicable)**

During the planning phase of the audit we will request and review schedules of expenditures of federal awards and state financial assistance. These schedules will be the basis for our determination of the specific programs we will test.

In documenting our understanding of the internal control system for the financial statement audit, we will identify control activities that impact major federal and state programs as well. This will allow us to test certain controls for the financial audit and the single audit concurrently. We will then perform additional tests of controls for each federal and state program selected for testing. We will then evaluate the results of the test of controls to determine the nature, timing and extent of substantive testing necessary to determine compliance with major program requirements.

## **Perform Statutory Compliance Testing**

We have developed audit programs for Koa Bay Community Development District designed to test Florida Statutes as required by the Auditor General. These programs include test procedures such as general inquiries, confirmation from third parties, and examination of specific documents.

### **Closing Phase**

During the closing phase we perform detail work paper reviews, request legal letters, review subsequent events and proposed audit adjustments. Communication with the client is critical in this phase to ensure that the information necessary to prepare financial statements in conformity with accounting principles generally accepted in the United States has been obtained.

### **Reporting Phase**

#### **Financial Statement Preparation**

As a local firm, we spend a considerable amount of time on financial statement preparation and support. With this in mind, we can assist in certain portions of the preparation of financial statements or simply review a draft of financials prepared by your staff. We let you determine our level of involvement.

#### **Management Letters**

*We want to help you solve problems before they become major.*

Our management letters go beyond citing possible deficiencies in the District's internal control structures. They identify opportunities for increasing revenues, decreasing costs, improving management information, protecting assets and improving operational efficiency.

The diversity of experience of our personnel and their independent and objective viewpoints make the comments, observations, and conclusions presented in our management letters a valuable source of information. We have provided positive solution-oriented objective recommendations to our governmental clients regarding investments, accounting accuracy, data processing, revenue bonds, payroll, utility billing, purchasing, budgeting, risk management, and internal auditing.

This review ensures the integrity of the factual data in the management letter but does not influence or impair our independence.

#### **Exit Conferences and Delivery of Reports**

We anticipate meeting with appropriate District personnel in February and issuing the final required reports by the May meeting of each year.

**PROPOSED AUDIT FEE**

DiBartolomeo, McBee, Hartley & Barnes P.A. will perform the annual audit of Koa Bay Community Development District as follows:

September 2025	\$ 3,200
September 2026	\$ 3,350
September 2027	\$ 3,500
September 2028	\$ 3,600
September 2029	\$ 3,750

The above fees are based on the assumption that the District maintains its current level of operations. Should conditions change or bonds are issued the fees would be adjusted accordingly upon approval from all parties concerned. If bonds are issued the fee would increase by \$1,250. The fee for subsequent annual renewals would be agreed upon separately.

**KOA BAY**  
**COMMUNITY DEVELOPMENT DISTRICT**

**4CII**





**Grau & Associates**  
CERTIFIED PUBLIC ACCOUNTANTS

# Proposal to Provide Financial Auditing Services:

**KOA BAY**

**COMMUNITY DEVELOPMENT DISTRICT**

Proposal Due: August 15, 2025  
12:00PM

**Submitted to:**

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

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**Submitted by:**

Antonio J. Grau, Partner  
Grau & Associates  
1001 W. Yamato Road, Suite 301  
Boca Raton, Florida 33431

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

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[www.graucpa.com](http://www.graucpa.com)



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# Grau & Associates

CERTIFIED PUBLIC ACCOUNTANTS

August 15, 2025

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

Re: Request for Proposal for Professional Auditing Services for the fiscal year ended September 30, 2025, with an option for two (2) additional annual renewals.

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

Government audits are at the core of our practice: **95% of our work is performing audits for local governments and of that 98% are for special districts.** With our significant experience, we are able to increase efficiency, to provide immediate and continued savings, and to minimize disturbances to your operations.

## Why Grau & Associates:

### Knowledgeable Audit Team

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

### Servicing your Individual Needs

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

### Developing Relationships

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

### Maintaining an Impeccable Reputation

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

### Complying With Standards

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

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

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

Very truly yours,  
Grau & Associates



---

Antonio J. Grau

# Firm Qualifications



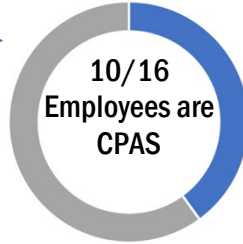
**Grau & Associates**  
CERTIFIED PUBLIC ACCOUNTANTS

# Grau's Focus and Experience

## Our Team



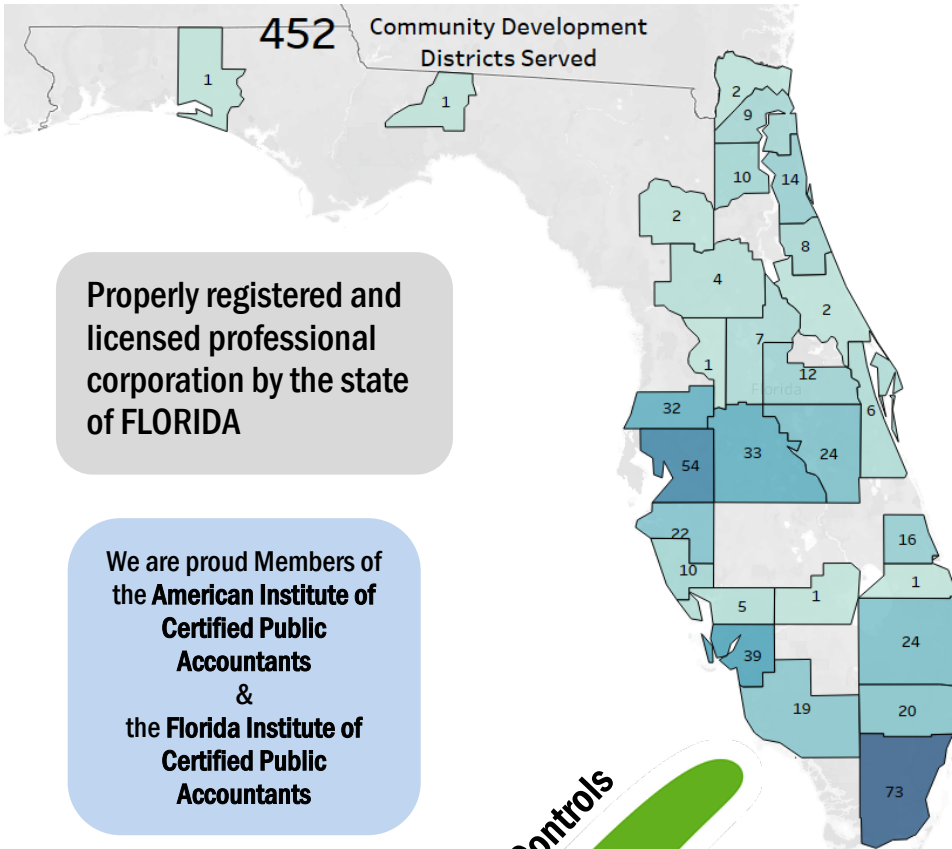
**3** Partners  
**11** Professional Staff  
**2** Administrative Professionals



# 2005

Year founded

## Services Provided



Properly registered and licensed professional corporation by the state of FLORIDA

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

## Quality Controls



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



AICPA | FICPA | GFOA | FASD | FGFOA

See next page for report and certificate



Florida Institute of Certified Public Accountants

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



Peer Review  
Program

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

**March 17, 2023**

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

**Dear Antonio Grau:**

It is my pleasure to notify you that on March 16, 2023, the Florida Peer Review Committee accepted the report on the most recent System Review of your firm. The due date for your next review is December 31, 2025. This is the date by which all review documents should be completed and submitted to the administering entity.

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

Thank you for your cooperation.

Sincerely,

*FICPA Peer Review Committee*

Peer Review Team  
FICPA Peer Review Committee

850.224.2727, x5957

cc: Daniel Hevia, Racquel McIntosh

Firm Number: 900004390114

Review Number: 594791

119 S Monroe Street, Suite 121 | Tallahassee, FL 32301 | 850.224.2727, in Florida | [www.ficpa.org](http://www.ficpa.org)

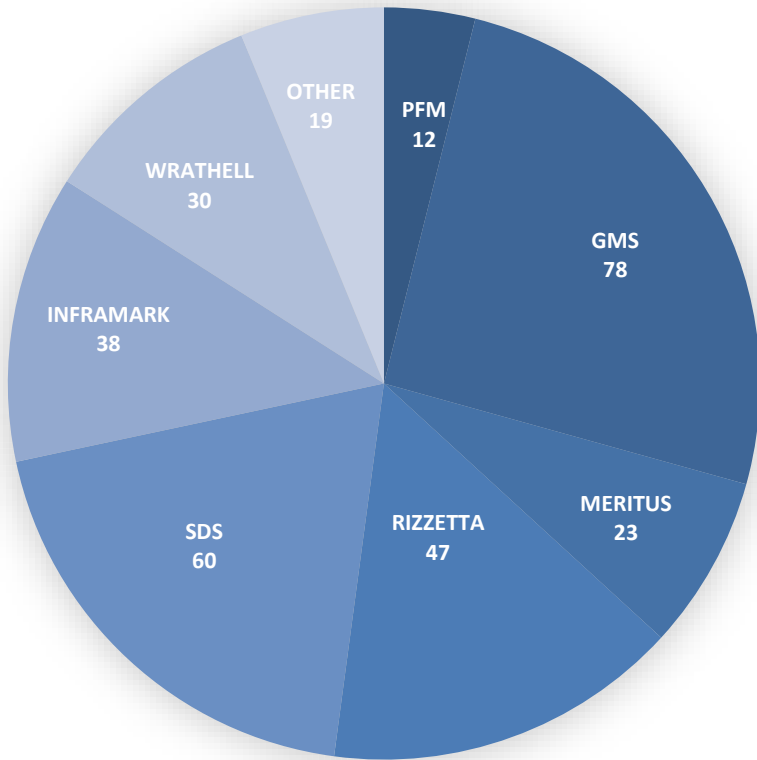
# Firm & Staff Experience



**Grau & Associates**  
CERTIFIED PUBLIC ACCOUNTANTS



## GRAU AND ASSOCIATES COMMUNITY DEVELOPMENT DISTRICT EXPERIENCE BY MANAGEMENT COMPANY



### *Profile Briefs:*

**Antonio J GRAU, CPA (Partner)**

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

**David Caplivski, CPA (Partner)**

*Years Performing Audits: 13+  
CPE (last 2 years): Government Accounting, Auditing: 24 hours; Accounting, Auditing and Other: 64 hours  
Professional Memberships: AICPA, FICPA, FGFOA, FASD*

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

- Tony Grau

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

-David Caplivski

## YOUR ENGAGEMENT TEAM

Grau's client-specific engagement team is meticulously organized in order to meet the unique needs of each client. Constant communication within our solution team allows for continuity of staff and audit team. The Certified Information Technology Professional (CITP) Partner will bring a unique blend of IT expertise and understanding of accounting principles to the financial statement audit of the District.



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

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



**Antonio 'Tony' J. Grau, CPA**  
**Partner**

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

**Experience**

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

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

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**Education**

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

**Clients Served** (partial list)

(>300) Various Special Districts, including:

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

**Professional Associations/Memberships**

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

**Professional Education** (over the last two years)

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



**David Caplivski, CPA/CITP, Partner**  
 Contact : [dcaplivski@graucpa.com](mailto:dcaplivski@graucpa.com) / 561-939-6676

**Experience**

Grau & Associates	Partner	2021-Present
Grau & Associates	Manager	2014-2020
Grau & Associates	Senior Auditor	2013-2014
Grau & Associates	Staff Auditor	2010-2013

**Education**

Florida Atlantic University (2009)  
 Master of Accounting  
 Nova Southeastern University (2002)  
 Bachelor of Science  
 Environmental Studies

**Certifications and Certificates**

Certified Public Accountant (2011)  
 AICPA Certified Information Technology Professional (2018)  
 AICPA Accreditation COSO Internal Control Certificate (2022)

**Clients Served (partial list)**

(>300) Various Special Districts	Hispanic Human Resource Council
Aid to Victims of Domestic Abuse	Loxahatchee Groves Water Control District
Boca Raton Airport Authority	Old Plantation Water Control District
Broward Education Foundation	Pinetree Water Control District
CareerSource Brevard	San Carlos Park Fire & Rescue Retirement Plan
CareerSource Central Florida 403 (b) Plan	South Indian River Water Control District
City of Lauderhill GERS	South Trail Fire Protection & Rescue District
City of Parkland Police Pension Fund	Town of Haverhill
City of Magnolia Island GERS	Town of Hypoluxo
Coquina Water Control District	Town of Hillsboro Beach
Central County Water Control District	Town of Lantana
City of Miami (program specific audits)	Town of Lauderdale By-The-Sea Volunteer Fire Pension
City of West Park	Town of Pembroke Park
Coquina Water Control District	Village of Wellington
East Central Regional Wastewater Treatment Fac.	Village of Golf
East Naples Fire Control & Rescue District	

**Professional Education (over the last two years)**

<u>Course</u>	<u>Hours</u>
Government Accounting and Auditing	24
Accounting, Auditing and Other	64
Total Hours	<u>88</u> (includes 4 hours of Ethics CPE)

**Professional Associations**

*Member, American Institute of Certified Public Accountants*  
*Member, Florida Institute of Certified Public Accountants*  
*Member, Florida Government Finance Officers Association*  
*Member, Florida Association of Special Districts*

# References



**Grau & Associates**  
CERTIFIED PUBLIC ACCOUNTANTS

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

### Dunes Community Development District

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

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### Two Creeks Community Development District

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

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### Journey's End Community Development District

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

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# **Specific Audit Approach**



**Grau & Associates**  
CERTIFIED PUBLIC ACCOUNTANTS

# **AUDIT APPROACH**

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

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

## **Proposed segmentation of the engagement**

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



## **Phase I - Preliminary Planning**

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

### **During this phase we will perform the following activities:**

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



## Phase II – Execution of Audit Plan

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

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

## Phase III - Completion and Delivery

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

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

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

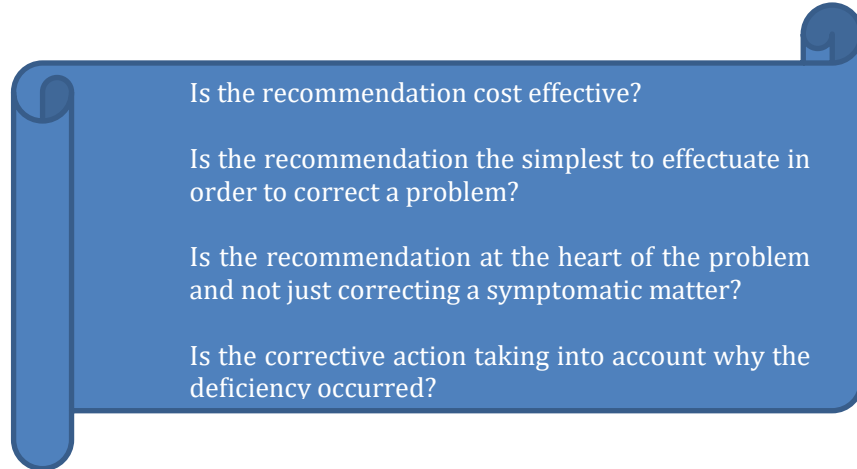
Application of this approach in developing our management letter is particularly important given the increasing financial pressures and public scrutiny facing today's public officials. We will prepare the management letter at the completion of our final procedures.

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

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

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

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



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

### **Communications**

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

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

# Cost of Services



**Grau & Associates**  
CERTIFIED PUBLIC ACCOUNTANTS

Our proposed all-inclusive fees for the financial audit for the fiscal years ended September 30, 2025-2027 are as follows:

<b>Year Ended September 30,</b>	<b>Fee</b>
2025	\$2,800
2026	\$2,900
2027	<u>\$3,000</u>
<b>TOTAL (2025-2027)</b>	<b><u>\$8,700</u></b>

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

# Supplemental Information



**Grau & Associates**  
CERTIFIED PUBLIC ACCOUNTANTS

## PARTIAL LIST OF CLIENTS

<b>SPECIAL DISTRICTS</b>	<b>Governmental Audit</b>	<b>Single Audit</b>	<b>Utility Audit</b>	<b>Current Client</b>	<b>Year End</b>
Boca Raton Airport Authority	✓	✓		✓	9/30
Captain's Key Dependent District	✓			✓	9/30
Central Broward Water Control District	✓			✓	9/30
Collier Mosquito Control District	✓			✓	9/30
Coquina Water Control District	✓			✓	9/30
East Central Regional Wastewater Treatment Facility	✓		✓		9/30
Florida Green Finance Authority	✓				9/30
Greater Boca Raton Beach and Park District	✓			✓	9/30
Greater Naples Fire Control and Rescue District	✓	✓		✓	9/30
Green Corridor P.A.C.E. District	✓			✓	9/30
Hobe-St. Lucie Conservancy District	✓			✓	9/30
Indian River Farms Water Control District	✓			✓	9/30
Indian River Mosquito Control District	✓				9/30
Indian Trail Improvement District	✓			✓	9/30
Key Largo Wastewater Treatment District	✓	✓	✓	✓	9/30
Lake Asbury Municipal Service Benefit District	✓			✓	9/30
Lake Padgett Estates Independent District	✓			✓	9/30
Lake Worth Drainage District	✓			✓	9/30
Lealman Special Fire Control District	✓			✓	9/30
Loxahatchee Groves Water Control District	✓				9/30
Old Plantation Water Control District	✓			✓	9/30
Pal Mar Water Control District	✓			✓	9/30
Pinellas Park Water Management District	✓			✓	9/30
Pine Tree Water Control District (Broward)	✓			✓	9/30
Pinetree Water Control District (Wellington)	✓				9/30
Port of The Islands Community Improvement District	✓		✓	✓	9/30
Ranger Drainage District	✓	✓		✓	9/30
Renaissance Improvement District	✓			✓	9/30
San Carlos Park Fire Protection and Rescue Service District	✓			✓	9/30
Sanibel Fire and Rescue District	✓				9/30
South Central Regional Wastewater Treatment and Disposal Board	✓				9/30
South Indian River Water Control District	✓	✓		✓	9/30
South Trail Fire Protection & Rescue District	✓			✓	9/30
Spring Lake Improvement District	✓			✓	9/30
St. Lucie West Services District	✓		✓	✓	9/30
Sunrise Lakes Phase IV Recreation District	✓			✓	9/30
Sunshine Water Control District	✓			✓	9/30
Sunny Hills Units 12-15 Dependent District	✓			✓	9/30
West Villages Improvement District	✓			✓	9/30
Various Community Development Districts (452)	✓			✓	9/30
<b>TOTAL</b>	<b>491</b>	<b>5</b>	<b>4</b>	<b>484</b>	

# **ADDITIONAL SERVICES**

## **CONSULTING / MANAGEMENT ADVISORY SERVICES**

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

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

## **ARBITRAGE**

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

**73** Current  
Arbitrage  
Calculations

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

**For even more information on Grau & Associates  
please visit us on [www.graucpa.com](http://www.graucpa.com).**

**KOA BAY**  
**COMMUNITY DEVELOPMENT DISTRICT**

**4D**



# KOA BAY COMMUNITY DEVELOPMENT DISTRICT

## AUDITOR EVALUATION MATRIX

RFP FOR ANNUAL AUDIT SERVICES	ABILITY OF PERSONNEL	PROPOSER'S EXPERIENCE	UNDERSTANDING OF SCOPE OF WORK	ABILITY TO FURNISH REQUIRED SERVICES	PRICE	TOTAL POINTS
<b>PROPOSER</b>	<b>20 POINTS</b>	<b>20 POINTS</b>	<b>20 POINTS</b>	<b>20 POINTS</b>	<b>20 POINTS</b>	<b>100 POINTS</b>
DiBartolomeo, McBee, Hartley & Barnes, P.A.						
Grau & Associates						

NOTES:

Completed by: \_\_\_\_\_  
Board Member's Signature

Date: \_\_\_\_\_

\_\_\_\_\_  
Printed Name of Board Member

**KOA BAY**  
**COMMUNITY DEVELOPMENT DISTRICT**

**7**

**KOA BAY**  
**COMMUNITY DEVELOPMENT DISTRICT**

**7A**



Florida

PO Box 631244 Cincinnati, OH 45263-1244

GANNETT

**AFFIDAVIT OF PUBLICATION**

Daphne Gillyard  
Koa Bay Community Development District  
2300 Glades RD # 410W  
Boca Raton FL 33431-8556

STATE OF WISCONSIN, COUNTY OF BROWN

Before the undersigned authority personally appeared, who on oath says that he or she is the Legal Advertising Representative of the Indian River Press Journal/St Lucie News Tribune/Stuart News, newspapers published in Indian River/St Lucie/Martin Counties, Florida; that the attached copy of advertisement, being a Legal Ad in the matter of Public Notices, was published on the publicly accessible websites of Indian River/St Lucie/Martin Counties, Florida, or in a newspaper by print in the issues of, on:

08/06/2025

Affiant further says that the website or newspaper complies with all legal requirements for publication in chapter 50, Florida Statutes. Subscribed and sworn to before me, by the legal clerk, who is personally known to me, on 08/06/2025

Legal Clerk

Notary, State of WI, County of Brown

3-7-27

My commission expires

Publication Cost:	\$272.48	
Tax Amount:	\$0.00	
Payment Cost:	\$272.48	
Order No:	11553344	# of Copies:
Customer No:	1488511	1
PO #:		

**THIS IS NOT AN INVOICE!**

*Please do not use this form for payment remittance.*

**REQUEST FOR QUALIFICATIONS FOR ENGINEERING SERVICES  
FOR THE KOA BAY COMMUNITY DEVELOPMENT DISTRICT  
RFQ for Engineering Services**

The Koa Bay Community Development District ("District"), located in the City of Ft. Pierce, Florida, announces that professional engineering services will be required on a continuing basis for the District's capital improvement plan, including Stormwater management system, roadways, water and wastewater, undergrounding of conduit, hardscape, landscape, irrigation, and offsite improvements, and other public improvements authorized by Chapter 190, Florida Statutes. The engineering firm selected will act in the general capacity of District Engineer and will provide District engineering services, as required.

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

The District will review all Applicants and will comply with Florida law, including the Consultant's Competitive Negotiations Act, Chapter 287, Florida Statutes ("CCNA"). All applicants interested must submit one (1) unbound and one (1) electronic copy of Standard Form No. 330 and Qualification Statement by 12:00 p.m. on August 22, 2025 to the attention of District Manager, Wrathell Hunt & Associates, LLC, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431 ("District Manager's Office").

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

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

Any protest regarding the terms of this Notice, or the evaluation criteria on file with the District Manager, must be filed in writing, within seventy-two (72) calendar hours (excluding Saturdays, Sundays, and state holidays) after the publication of this Notice. The formal protest setting forth with particularity the facts and law upon which the protest is based shall be filed within seven (7) calendar days (including Saturdays, Sundays, and state holidays) after the initial notice of protest was filed. Failure to timely file a notice of protest or failure to timely file a formal written protest shall constitute a waiver of any right to object or protest with respect to aforesaid Notice or evaluation criteria provisions. Any person who files a notice of protest shall provide to the District, simultaneous with the filing of the notice, a protest bond with a responsible surety to be approved by the District and in the amount of Ten Thousand Dollars (\$10,000.00). Additional information and requirements regarding protests are set forth in the District's proposed Rules of Procedure, which are available from the District Manager.  
PUB 8/6/2025  
TCN 11553344

KAITLYN FELTY  
Notary Public  
State of Wisconsin



**KOA BAY**  
**COMMUNITY DEVELOPMENT DISTRICT**

**7B**

**REQUEST FOR QUALIFICATIONS FOR ENGINEERING SERVICES  
FOR THE KOA BAY COMMUNITY DEVELOPMENT DISTRICT**

*RFQ for Engineering Services*

The Koa Bay Community Development District (“**District**”), located in the City of Ft. Pierce, Florida, announces that professional engineering services will be required on a continuing basis for the District’s capital improvement plan, including Stormwater management system, roadways, water and wastewater, undergrounding of conduit, hardscape, landscape, irrigation, and offsite improvements, and other public improvements authorized by Chapter 190, *Florida Statutes*. The engineering firm selected will act in the general capacity of District Engineer and will provide District engineering services, as required.

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

The District will review all Applicants and will comply with Florida law, including the Consultant’s Competitive Negotiations Act, Chapter 287, Florida Statutes (“CCNA”). All applicants interested must submit one (1) unbound and one (1) electronic copy of Standard Form No. 330 and Qualification Statement by 12:00 p.m. on August 22, 2025 to the attention of District Manager, Wrathell Hunt & Associates, LLC, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431 (“District Manager’s Office”).

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

The District reserves the right to reject any and all Qualification Statements. Additionally, there is no express or implied obligation for the District to reimburse Applicants for any expenses

associated with the preparation and submittal of the Qualification Statements in response to this request.

Any protest regarding the terms of this Notice, or the evaluation criteria on file with the District Manager, must be filed in writing, within seventy-two (72) calendar hours (excluding Saturdays, Sundays, and state holidays) after the publication of this Notice. The formal protest setting forth with particularity the facts and law upon which the protest is based shall be filed within seven (7) calendar days (including Saturdays, Sundays, and state holidays) after the initial notice of protest was filed. Failure to timely file a notice of protest or failure to timely file a formal written protest shall constitute a waiver of any right to object or protest with respect to aforesaid Notice or evaluation criteria provisions. Any person who files a notice of protest shall provide to the District, simultaneous with the filing of the notice, a protest bond with a responsible surety to be approved by the District and in the amount of Ten Thousand Dollars (\$10,000.00). Additional information and requirements regarding protests are set forth in the District's proposed Rules of Procedure, which are available from the District Manager.

**KOA BAY COMMUNITY DEVELOPMENT DISTRICT**

**DISTRICT ENGINEER PROPOSALS**

**COMPETITIVE SELECTION CRITERIA**

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

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

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

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

**3) Geographic Location** (Weight: 20 Points)

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

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

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

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

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

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

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

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

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



**KOA BAY**  
**COMMUNITY DEVELOPMENT DISTRICT**

**7C**

Prepared for:  
**Koa Bay Community  
Development District**  
District Manager  
Wrathell Hunt & Associates, LLC  
2300 Glades Road, Suite 410W  
Boca Raton, FL 33431



**Request for Proposals**  
**Due: August 22, 2025 @ 12:00 PM**  
**DISTRICT ENGINEERING SERVICES**



Prepared by:

**CAPTEC Engineering, Inc.**

Joseph W. Capra, PE, President

Quality Control Manager

301 NW Flagler Avenue

Stuart, Florida 34994

772-692-4344

[www.gocaptec.com](http://www.gocaptec.com)





# **REQUEST FOR QUALIFICATIONS DISTRICT ENGINEERING SERVICES**

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## 1) ABILITY AND ADEQUACY OF PROFESSIONAL PERSONNEL

August 22, 2025

District Manager  
Wrathell, Hunt & Associates, LLC  
2300 Glades Road, Suite 410W  
Boca Raton, FL 33431

Re: **REQUEST FOR QUALIFICATIONS FOR ENGINEERING SERVICES FOR THE KOA BAY COMMUNITY DEVELOPMENT DISTRICT**

Dear Selection Committee Members:

**CAPTEC Engineering, Inc.**, a Treasure Coast Firm located in Stuart (Martin County), FL, is pleased to submit this response for Request for Qualifications for Engineering Services for the Koa Bay Community Development District.

CAPTEC was founded in Stuart in 1996. CAPTEC's Ownership is under the direction of Mr. Joseph W. Capra, PE, President and Patricia Capra, Vice-President. CAPTEC is Small Business Enterprise (SBE) certified with the South Florida Water Management District (SFWMD). Our staff members live on the Treasure Coast; therefore, we are personally and professionally aware of the current and future infrastructure and service needs of local Communities.

For nearly three decades, CAPTEC has provided all aspects of Civil Engineering Services from Design, Permitting, Bid Assistance, Construction Engineering Inspection (CEI), Grant Compliance, Project Administration and Expert Witness Services on the Treasure Coast. Our 17-member professional staff brings deep expertise in roadways, drainage, stormwater management, resiliency and studies, water distribution, wastewater, reclaimed water distribution, parks, facilities, master plans, traffic, pedestrian, streetscape and offsite improvements. **CAPTEC** also partners with trusted Sub-Consultant firms whom we have worked with for many years who provide specialized expertise in various areas such as undergrounding of conduit, hardscape, landscape, planning, irrigation, soils testing, environmental resources and surveying services.

**CAPTEC's Engineering Management Team** includes Mr. Thomas (TJ) Shaw, PE, Mr. James Carnes, PE, Mr. Steven Marquart, PE, and Mrs. Teresa (Teri) Andre, PE. These engineers will lead engineering support and will be assisted by four Design/ CADD Technicians and two Project Coordinators/ Assistant Managers that handle Grant and Permitting Services. Mr. Joseph W. Capra, P.E., Principal Engineer, will provide QA/QC Reviews and oversee all services. Mr. Gary Jones, P.E., will provide Constructability Reviews and monitor all Construction (CEI) Services. Mr. Jones has extensive CEI and Construction Administration experience throughout the Treasure Coast and is knowledgeable of Martin and St. Lucie County Utility requirements, SFWMD, FDEP, and FDOT standards. The **CAPTEC** staff are familiar with the County's Land Development Regulations, Codes and Ordinances.

CAPTEC has completed many planning and design projects for St. Lucie County, the City of Fort Pierce, the City of Port St. Lucie and the surrounding Municipalities. Our expert knowledge of County, City, Regulatory and FDOT specifications and contractual requirements, have



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www.gocaptec.com

benefited the Cities and local Municipalities in avoiding additional project costs. CAPTEC has been involved with obtaining millions of dollars in grants for Public Entities. CAPTEC is known for its Stormwater Management Design and Permitting on the Treasure Coast. We have modeled and designed Stormwater Retrofits for most of the outfalls in the City of Port St. Lucie and Martin County. We have designed retrofits for the city of Fort Pierce and St. Lucie County. We have inventory of all the Drainage Basins in Port St. Lucie. We have worked for the City of Port St. Lucie’s Community Development District’s (CDD) and Special Assessment District’s (SAD) for the East Lake Village project. CAPTEC is currently the Interim District Engineer for Koa Bay Community Development District (CDD).

**CERTIFIED**

CAPTEC staff are registered and certified in all the necessary FDOT Design categories and Local Agency Program (LAP). The CAPTEC staff are FDOT prequalified in the following areas: 3.1 Minor and 3.2 Major Highway Design, Traffic Engineering and Operations Studies, Signing, Pavement Marking and Channelization, 10.1 Roadway Construction Engineering Inspection Services and 13.6 Land Planning/ Engineering. CAPTEC currently utilizes the FDOT Electronic Review Comments (ERC) or County LAP projects and FDOT Design projects and is familiar with the FDOT approval process.

**TECHNOLOGY and TRAINING**

Our firm maintains current design software and hardware, upgraded annually, and invests in continuous staff training through seminars and webinars. The CAPTEC Team will work as an extension of the Community Development District’s staff. The CAPTEC Team is committed to working seamlessly with the CDD, delivering quality, cost-effective projects on time and within budget.

As a local professional firm, CAPTEC is dedicated in providing first class service to all our Clients. We strive to remain versatile and embrace enhancements to our existing procedures and practices. We live in a rapidly evolving world where priorities and processes can change dramatically in a very short period of time. Recognizing the need to remain competitive in a flexible market, we constantly strive to anticipate change, proactively expand our knowledge base and enhance our ability to provide our Clients with prompt, relevant, progressive service. CAPTEC’s main focus will be to provide our Client with optimum service, completing the project on time and within budget. CAPTEC recognizes that a successful project close-out includes coordination with County maintenance staff for a seamless turnover. The project’s finalization includes all close-out documentation, permit certifications, as-built requirements necessary for proper insertion into the County’s GIS database, and proper warranties are in place.

The **CAPTEC Team** is IMMEDIATELY AVAILABLE with the resources necessary to complete the CDD’s Engineering Services assignments on time and within budget. The **CAPTEC Team** are invested in the Community as both Residents and Business Owners, and our Team has “No Conflicts of Interest”. The **CAPTEC Team** appreciates this opportunity to present our qualifications, and we look forward to the selection process.

Sincerely,

  
Joseph W. Capra, PE, President  
[icapra@gocaptec.com](mailto:icapra@gocaptec.com)

## 2) CONSULTANT'S PAST PERFORMANCE



**CAPTEC Engineering Inc.**, located in Stuart, Martin County, Florida is within 30 minutes of the Koa Bay Development in Fort Pierce. Since 1996, CAPTEC has served as the Town Engineer for the Town of Sewall's Point and provides all services from oversight of roadway maintenance / Storm water permitting and retrofits/ CRS oversight/ LMS involvement / MPO involvement / FEMA House Raising oversight/ Stormwater Maintenance and Monitoring/ MS4 compliance/ FEMA Reviews/ Hurricane compliance and recovery assistance and involvement with all Town Meetings/ to Liaison with the other local Municipalities and the FDOT, SFWMD, ACOE and FDEP. CAPTEC is the City Engineer reviewing all new site plans/ developments for the City of Stuart. We are actively providing District Engineering Services for the 298 District of Indian Trail Improvement District. In the past, CAPTEC was the City of Fort Pierce's Development Review Engineer. CAPTEC also worked directly with the Town of Tradition's Community Development District No. 1 (CDD), Tradition Special Assessment District (SAD) and the City of Port St. Lucie Community Redevelopment Agency (CRA).

The CAPTEC staff have completed a vast variety of projects on the Treasure Coast over the past 29 years. Our projects include **Roadway Designs and CEI Services** for major roadway thoroughfare projects in Martin County such as the Western Palm City Corridor/ Citrus Blvd. and the Green River Parkway. For the City of Port St. Lucie, we are currently working on Floresta Drive widening, Hegener Drive, Tom Mackie Blvd. and Marshall Parkway extension projects and Peacock Blvd./ St. Lucie West Intersection Improvements. CAPTEC has completed the widening of Bayshore Boulevard, Lennard Road and Becker Road from 2-lanes to 4-lanes. We have completed many "Complete Street" projects such as Mapp Road in Palm City, Colorado Avenue, Osceola Street, East Ocean Boulevard, all in the City of Stuart and U.S. No. 1 in Tequesta. Our staff completed many LAP sidewalk projects for the City of Port St. Lucie, the Dixie Highway/ Savannah Road sidewalk for Martin County and recently Dixie Highway for the City of Stuart. We have designed three (3) different Pedestrian Bridges in Port St. Lucie. We have completed over 36-miles of roadway in the Tradition Community of major thoroughfares for the Tradition CDD. We have designed various roundabouts in Martin County and at least five (5) for the City of Port St. Lucie. CAPTEC also completed the Selvitz Road Culvert Replacement, and Safe Routes to School for St. Lucie County.

CAPTEC has provided design services for multiple projects that incorporated **Park, and Site Improvements**. Those projects include but are not limited to the City of Fort Pierce Veterans Park, Stuart Beach, Bathtub Beach, Twin Rivers Park and the City of Stuart Riverwalk/ Boardwalk. The Park improvements for Twin Rivers Park included designing a circular access drive into the park with stabilized parking, restroom facilities, ADA compliant parking spaces, improvements to SE Seamark Place, lift station, sanitary sewer, water lines, fire hydrant, drainage improvements and ADA paved walkways to fishing piers. CAPTEC worked with the City of Port St. Lucie's CRA Community Development District (CDD) and Special Assessment District (SAD) to develop the mixed-use parcel for residential homes and commercial buildings with improvements consisting of site grading, water, sewer, drainage facilities, stormwater management and roadway design. CAPTEC is currently providing design and permitting services for Blind Creek Parking Lot and Restroom Improvements for St. Lucie County and the Wilderness Park, Cambridge and Port Preserve Trail Phases 1-3 for the City of Port St. Lucie consisting of 10-foot-wide concrete sidewalk, and multi-use path with Public Art Street Markings.

CAPTEC has worked on a variety of **Utility projects** including Water / Sewer / Gas / IT Utility Design, Permitting and CEI services for improvements including replacement of aging water and fire lines such as the High Point Subdivision in the Town of Sewall's Point (TOSP) for Martin County Utilities. CAPTEC provided a 24-inch water main extension and a 12-inch water main replacement on Bayshore Boulevard for the City of Port St. Lucie Utility Department. We have completed the 12 to 30-inch diameter I.Q. Water Main extensions and Water Main replacement projects for the City of Stuart and South Martin Regional Utilities (SMRU). CAPTEC

completed the Design/ Permitting/ Bidding and CEI Services for replacing all the water mains within Jupiter Island for SMRU. CAPTEC prepared the Water and Sewer Specifications for the City of Stuart and is familiar with the typical Water and Sewer Design requirements of all the local Utility providers. CAPTEC has recently completed several line extensions for the City of Port St. Lucie for the 24-inch Force Main in the Morningside area and is currently completing a 16-inch force main along Midway Road for St. Lucie County.

The CAPTEC Mission Statement recognizes the requirements of **Services to our Clients**. Our Staff reviews their mission statement in our weekly staff meetings. Our weekly staff meetings review projects internally with various Engineers to consider alternative options to improve projects. In addition, CAPTEC documents all meetings and regularly has team meetings with Sub-Consultants and our Clients. We efficiently have meetings, either by conference calls, videoconferencing or on site. Our projects are regularly Quality Controlled to be sure they are completed on time and within budget. We also listen to all Contractors during the bidding process to Value Engineer projects. When the bidding process is complete, CAPTEC produces "Approved for Construction" set of plans that reflects the best design possible and whereby construction is completed in the most cost-efficient manner.

CAPTEC records all meetings utilizing AI Technology and conducts regular meetings with our Sub-Consultants and our Clients primarily via Conference Calls, Video Conferencing (Teams or Zoom meetings), or on-site, if preferred. Upon completion of contract negotiation and award, the CAPTEC Project Team Members will meet with the Client's Staff to review the scope, budget, timeline, milestone dates and associated activities. Following this meeting, an in-house Kick-Off Meeting is scheduled and attended by the Project Manager, Inspectors and Project Coordinator along with any Sub-Consultants. Among other topics, the project budget and schedule are reviewed.

CAPTEC has included the following list of Sub-Consultants that can assist with any of the District's projects, if needed:

- **Wojcieszak & Associates, Inc.** - [Electrical Services](#)
- **Hobe Sound Environmental Consultants, Inc.** – [Environmental Services](#)
- **Andersen Andre Consulting Engineers, Inc.** – [Geotechnical Engineering Services](#)
- **Michael Flaugh Landscape Architects** – [Landscaping / Planning Services](#)
- **N2 Architects** – [Architectural Services](#)
- **TRC Worldwide Engineering, Inc.** – [Structural Engineering Services](#)
- **Betsy Lindsay, Inc. (dba Haley Ward) and NorthStar Geomatics, Inc.** – [Surveying and Mapping Services](#)
- **MacKenzie Engineering & Planning, Inc.** – [Traffic Engineering Services](#)
- **Constructive Engineering, Inc.** – [Undergrounding Utility Services](#)

The CAPTEC Team works as an extension of the Client's project staff to maintain frequent communication and use each opportunity to put value-added features into the project design to incorporate cost savings and time savings. Our weekly staff meetings review projects internally with Engineers to consider alternative options to improve projects. All projects at CAPTEC are monitored through a "Project Status Report" updated weekly by the Project Coordinator and discussed each week at the CAPTEC Production Staff Meetings. These weekly meetings also have a production report which mentions all the project milestones and deadlines. The Project Managers review support staff's weekly time sheets, as well as Sub-Consultant invoices and associated activities to ensure that all team members are on task and within the project timeline and budget. Further reviews are performed monthly during the billing process. The CAPTEC Team looks forward to meeting with the Client's staff to show how our specific knowledge of design/ permitting and various construction techniques can complete project assignments within budget and on schedule.

CAPTEC is aware of the importance of obtaining field data including right-of-way/survey data, geotechnical information/ environmental needs, and other utility information, utilized to accurately generate plans that can be permitted and constructed by a competent Contractor. This information also assists in providing realistic cost estimates during the preliminary/planning stage. Projects are managed by seasoned professionals who understand the intricacies and complexities of municipal projects.

### **Quality Control Milestone**

The actual Quality Control reviews happen during all phases of the project design from the preliminary receipt of field data by field inspections to review of modeling for errors in the preliminary phase, to review of cost estimates and reports at various times during the preliminary phase by a separate engineer from the preparer in the CAPTEC organization. Upon working on the Final Engineering Plans, Quality Control reviews are made by the Principal at the 30%, 60% (permit plans), 90% and 100% phase and Bid phase. During the 60-90% phase a Constructability Review is provided prior to issuance of plans for construction. The “Approved For Construction” (AFC) Plan reviews are completed which incorporates Clients/ Regulators, various Contractors comments and local neighborhood resident’s concerns, prior to working in the field. Only AFC Plans are allowed on the project during the construction phase. Any changes or additional information revised during construction is also processed for a QA/QC review and changes are issued with copies to all Contractors, Surveyors, Inspectors, Sub-Contractors and Project Managers.



301 NW Flagler Avenue, Stuart, FL 334994 \* 772-692-4344



**ARCHITECT – ENGINEER QUALIFICATIONS  
PART I – CONTRACT-SPECIFIC QUALIFICATIONS  
A. CONTRACT INFORMATION**

1. TITLE AND LOCATION (*City and State*)

**Koa Bay Community Development District RFQ for Engineering Services, Fort Pierce, FL**

2. PUBLIC NOTICE DATE

**August 22, 2025**

3. SOLICITATION OR PROJECT NUMBER

**District Engineering Services**

**B. ARCHITECT-ENGINEER POINT OF CONTACT**

4. NAME AND TITLE

**Joseph W. Capra, PE, President/ Quality Control Manager**

5. NAME OF FIRM

**CAPTEC Engineering, Inc.  
301 NW Flagler Avenue  
Stuart, FL 34983**

6. TELEPHONE NUMBER

**772-692-4344**

7. FAX NUMBER

**772-692-4341**

8. E-MAIL ADDRESS

**[jcapra@gocaptec.com](mailto:jcapra@gocaptec.com)**

**C. PROPOSED TEAM**

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

	(Check)			9. FIRM NAME <input type="checkbox"/> CHECK IF BRANCH OFFICE	10. ADDRESS	11. ROLE IN THIS CONTRACT
	PRIME	J-V PARTNER	SUBCON-TRACTOR			
a.	X			<b>CAPTEC Engineering, Inc.</b> <input type="checkbox"/> CHECK IF BRANCH OFFICE	301 NW Flagler Avenue Stuart, FL 34994	Civil Engineering Design, Permitting and Construction Engineering Inspection Services
b.			X	<b>Wojcieszak &amp; Associates, Inc.</b> <input type="checkbox"/> CHECK IF BRANCH OFFICE	833 East 5 <sup>th</sup> Street Stuart, FL 34994	Electrical Engineering Services
c.			X	<b>Hobe Sound Environmental Consultants, Inc.</b> <input type="checkbox"/> CHECK IF BRANCH OFFICE	9512 SE Duncan Street Hobe Sound, FL 33455	Environmental Services
d.			X	<b>Andersen Andre Consulting Engineers, Inc.</b> <input type="checkbox"/> CHECK IF BRANCH OFFICE	834 SW Swan Avenue, Port St. Lucie, FL 34983	Geotechnical Engineering Services
e.			X	<b>N2 Architect</b> <input type="checkbox"/> CHECK IF BRANCH OFFICE	710 SE Ocean Blvd. Stuart, FL 34994	Architectural Services
f.			X	<b>Michael Flaugh Landscape Architect</b> <input type="checkbox"/> CHECK IF BRANCH OFFICE	3744 SE Ocean Blvd. Stuart, FL 34996	Landscaping & Planning Services
g.			X	<b>TRC Worldwide Engineering, Inc.</b> <input type="checkbox"/> CHECK IF BRANCH OFFICE	11926 Fairway Lakes Drive Fort Myers, FL 33913	Structural Engineering Services
h.			X	<b>Betsy Lindsay, Inc. (A Division of Haley Ward)</b> <input type="checkbox"/> CHECK IF BRANCH OFFICE	7997 SW Jack James Drive Stuart, FL 34997	Surveying Services

i.		X	<b>NorthStar Geomatics, Inc.</b> <input type="checkbox"/> CHECK IF BRANCH OFFICE	5820 Zenith Drive Port St. Lucie, FL 34986	Surveying & GIS Services
j.		X	<b>MacKenzie Engineering &amp; Planning, Inc.</b> <input type="checkbox"/> CHECK IF BRANCH OFFICE	1172 SW 30 <sup>th</sup> Street, Suite 500 Palm City, FL 34990	Traffic Engineering Services
k.		X	<b>Constructive Engineering, Inc.</b> <input type="checkbox"/> CHECK IF BRANCH OFFICE	9100 Belvedere Road, Unit 108 Royal Palm Beach, FL 33411	Underground Utility Services
<b>D. ORGANIZATIONAL CHART OF PROPOSED TEAM</b>				<input checked="" type="checkbox"/>	<i>(Attached)</i>

Koa Bay Community Development District (CDD)  
District Engineering Services  
CAPTEC Engineering, Inc.  
Joseph Capra, PE - Principal in Charge/Quality Control



Project Management  
Civil Engineering Design Services Team

CAPTEC Project Managers

TJ Shaw, PE  
James Carnes, PE  
Teresa (Teri) Andre, PE  
Steven Marquart, PE  
Sr. Project Engineers/ Project Management

CAPTEC Design Staff

Roger Cummins  
Sr. Project Designer  
Mark Baldwin  
Sr. CADD Designer  
Jesse Kirila & Justin Capra  
Civil Design Technicians  
Gina Colonna & Karen Krumbholz  
Project Coordinators

CAPTEC CEI Services

Gary Jones, PE  
Director of Construction Services/  
Constructability

Electrical Services

Wojcieszak & Associates

**Sub-Consultant Team Members**

Architectural Design Services

N2 Architects

Land Surveying & GIS Mapping Services

Haley Ward  
NorthStar Geomatics, Inc.

Environmental Services

Hobe Sound Environmental Services

Landscape & Planning Services

Michael Flaugh Landscape Architects

Traffic Engineering Services

MacKenzie Engineering & Planning, Inc.

Geotechnical Services

Andersen Andre Consulting Engineers, Inc.

Structural Design Services

TRC Worldwide Engineering, Inc.

Underground Utility Services

Constructive Engineering, Inc.

**E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT**

(Complete one Section E for each key person.)

12. NAME <b>Joseph W. Capra, P.E., President</b>	13. ROLE IN THIS CONTRACT Principal in Charge/ Quality Control	14. YEARS EXPERIENCE	
		a. TOTAL 43	b. WITH CURRENT FIRM 29

15. FIRM NAME AND LOCATION (City and State)  
CAPTEC Engineering, Inc. (Stuart, Florida)

16. EDUCATION (Degree and Specialization) Bachelor of Science in Civil Engineering, Rensselaer Polytechnic Institute, New York, 1979	17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline) Professional Engineer in the State of Florida (License No. 37638)
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18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)  
Mr. Capra has over 43 years of experience in civil engineering design/permitting/construction services for storm water, drainage and utilities systems; downtown/CRA re-development; roadway projects. Mr. Capra has assisted local municipalities with grant acquisition/public funding (including TAP, LAP, CDBG, HMGP, SLRIT, and FDOT Enhancement Funds), scheduling, project management, and liaison efforts with government agencies. Mr. Capra also utilizes the latest FDOT Design Standards, FDOT Greenbook, FDOT Design Manual, and FDOT Utility Manual. During the 29 years of CAPTEC's operation, Mr. Capra has been the Principal in Charge for the Roadway, Stormwater and Utility Coordination for Continuing Services Contracts with the City of Port St. Lucie, Martin County, the City of Stuart, the City of Fort Pierce and St. Lucie County. Mr. Capra is a Member of Florida Engineering Society Treasure Coast; was 2007 Engineer of the Year; FICE; NSPE; ASCE Member; Martin & St. Lucie County Economic Councils; Martin Co. MPO TAC Member; Former SFWMD WRAC Member; former Stuart Charter Review Committee member; FDOT Advanced MOT and LAP Certifications

**19. RELEVANT PROJECTS**

(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (if applicable)
<b>Southern Grove Analysis and Master Plan (Port St. Lucie, FL)</b>	Dec 2019 - Nov 2020	
<p>(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <span style="float:right"><input checked="" type="checkbox"/> Check if project performed with current firm</span></p> <p>A. Mr. Capra was the Quality Control Manager for preparing an Analysis and Master Plan with the Treasure Coast Regional Planning Council for the City of Port St. Lucie. This recent project consisted of due diligence review of the Southern Grove infrastructure for preparing roadway, sidewalks, bike paths, signage lighting, water, sanitary sewer and drainage Master Plans and Cost Estimates. The Preliminary findings were presented to City Council for approval &amp; final report prepared based on comments. Consultant Cost: \$55,000.00</p>		
<b>Indian Trail Improvement District Traffic Calming &amp; Stormwater Management Services, (West Palm Beach, FL)</b>	2015 to ongoing	ongoing
<p>(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <span style="float:right"><input checked="" type="checkbox"/> Check if project performed with current firm</span></p> <p>B. Mr. Capra serves as the District Traffic Engineer and provided a traffic calming study within the M-1 and M-2 Drainage Basin and reviewed conceptual traffic calming measures at intersection locations within the district boundaries. There are 71 intersections in this area. Improvements included mid-block island/ speed tables, roundabouts and raised median approaches at intersections with pavement marking enhancement. Currently . CAPTEC is designing R3 Roadway Plans for 37,981 feet (12 roadways) that will convert unpaved roads to paved roadways for a total of 7-miles. The roadway designs include two (2) 11-foot lanes and rural swale for drainage, 5-foot sidewalk on one side were existing and driveway adjustments. CAPTEC is also providing CEI services for the removal of existing speed bumps and layout of new speed bump locations, milling and paving, striping and sign installations. CAPTEC will ensure all constructed sidewalks meet ADA guidelines, will review and monitor the Contractor's erosion control plan, and provide final Certification of the project upon completion of the work. CAPTEC provides District Engineering support on Stormwater Management items which entailed the updating of the GIS LIDAR Data by FEMA to remap this rural area of Palm Beach County. Consultant Cost: \$1.5 Million +</p>		
<b>Floresta Drive Widening Phases 2 &amp; 3 (Port St. Lucie, FL)</b>	Apr 2020 to on-going	
<p>(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <span style="float:right"><input checked="" type="checkbox"/> Check if project performed with current firm</span></p> <p>C. Mr. Capra provides Quality Control for this project working with American Consulting Engineers (Conсор) for the City of PSL to provide storm management, signal and utility services for roadways and ponds. The Floresta Drive improvements are approximately 1.55 miles from south of the Elkcarn Waterway through Crosstown Parkway and 1.25 miles from Crosstown Parkway to Prima Vista Blvd. The intention of this roadway design, bike lanes, median and to build the roadway above the 25-year 3-day Storm event. Services include preparation of drainage and utility construction plans and permitting; preparation of contract documents to include final quantities and technical specifications for the bidding process. Consultant Cost: \$572,532.00</p>		
<b>Town Engineer, Town of Sewall's Point (Stuart, FL)</b>	1996 - ongoing	
<p>(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <span style="float:right"><input checked="" type="checkbox"/> Check if project performed with current firm</span></p> <p>D. Mr. Capra has served as the Town of Sewall's Point's Engineer since our founding in 1996, providing the Town with all infrastructure design, permitting and construction inspection services. Services include cost estimating, coordination with contractors, value engineering and negotiation with Contractors to reduce project costs to conform with the Town's budgets. Projects completed roadway improvements for North &amp; South Sewall's Point Road, annual pavement overlay projects, annual review of Town drainage needs and prioritization of projects for budgetary purposes, attending Town Commission meetings to provide updates on Town projects, review of subdivision development packages, and annual bridge reports from the FDOT. The Town is continually working on stormwater system maintenance and annual roadway work.</p>		

**E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT**

(Complete one Section E for each key person.)

12. NAME <b>Thomas (TJ) Shaw, PE</b>	13. ROLE IN THIS CONTRACT Project Design Engineer/ Manager	14. YEARS EXPERIENCE	
		a. TOTAL 12	b. WITH CURRENT FIRM 10

15. FIRM NAME AND LOCATION (City and State)  
CAPTEC Engineering, Inc. (Stuart, Florida)

16. EDUCATION (Degree and Specialization)  
B.S. Industrial Engineering, University of Florida, Gainesville 2012

17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline)  
Professional Engineer in the State of Florida (License No. 93244)

18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)  
Mr. Shaw has over 12 years of expertise in ICPR modeling, design and permitting of stormwater basin design and improvements, drainage systems, water and sewer, cost estimating, utility specification preparation and construction administration services. Mr. Shaw is proficient in the latest versions of AutoCAD's Civil3D including the FDOT State Kit and FDOT Connect. Mr. Shaw also utilizes the FDOT Design Standards, FDOT Greenbook, FDOT Design Manual, FDOT Utility Manual and is FDOT Advanced Maintenance of Traffic (MOT) certified. Mr. Shaw is a member of the Florida Engineering Society (FES).

**19. RELEVANT PROJECTS**

	(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION (if applicable)
A.	<b>Indian River Drive/ Ocean Breeze RV Resort (Jensen Beach, FL)</b>	Mar. 2014 to Mar. 2017	2016 - 2017
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Mr. Shaw was the Project Design Engineer for this project providing design, conceptual planning, permitting and construction services for the installation of the gravity sewer main systems, the reconstruction of roadways into a Complete Street with Bioswales/ water and sewer lines and stormwater improvements. Added traffic calming features to the roadway and stormwater treatment train retrofit due to adjacent proximity to the Indian River. Consultant Cost \$555,635.00		
B.	<b>SR A1A Town of Highland Beach Complete Street/ Stormwater Concept Plan (Highland Beach, FL)</b>	Nov.2018 to March 2019	
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Mr. Shaw was the Project Design Engineer for the design and permitting of two (2) Stormwater Treatment Areas in the Sagamore Basin. Services included the STA design, slope stabilization improvements, control structure and pipe design, preparation of MOT plans, obtain necessary permits from all applicable regulatory agencies, conduct public informational meetings, utility coordination and post design services. Consultant Cost: \$67,800.00		
C.	<b>City of Stuart CRA Dixie Highway Triangle project (Stuart, FL)</b>	May 2022 - ongoing	
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Mr. Shaw is the Project Design Engineer for preparing a Conceptual "Complete Street" Plan for the Triangle Area on South Dixie Highway from Colorado Avenue to Joan Jefferson Way. The conceptual exhibit was a streetscape plan which included paving, sidewalks, landscaped islands, crosswalks and street lighting. This project is in the final design phase. FDOT/ MPO TA Funding Grant assistance has been provided. Consultant Cost: \$155,000.00		
D.	<b>Martin County Savannas Regional Restoration project (Jensen Beach, FL)</b>	Jan. 2017 – April 2018	
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Mr. Shaw was the Project Design Engineer who completed the review, analysis, model, cost estimates, and a report that provided model simulations of 20,000 Acres for the proposed scenarios, for stormwater management improvements to the regional system, located in the Savannas Preserve located within both Martin and St. Lucie County. Phase I of this restoration project provided an existing condition hydrological model, in an effort to identify and define areas deficient in typical Level of Service standards; delineate hydrologic watershed and sub-basins; identify current operational schedules and develop alternatives for operational flexibility; define habitat restoration, hydrologic and water quality needs; provided model simulations on proposed scenarios for improvements to the regional system; and prepared preliminary cost estimates and evaluations for each alternative plan. Specifically, in this Phase I component, the Water Management and Natural Systems Evaluation report allowed Martin County and the other stakeholders (City of Port St. Lucie/ Fort Pierce/ St. Lucie County/ SFWMD/ FDOT/ FDEP) to adequately understand how the system currently operates and where opportunities are available for optimized water operations, restoration needs, water quality improvements, and flood level of service projects. This phased project focused on 1) alleviating community flooding 2) optimizing water management operations, 3) improving natural habitats and 4) improving water quality in the Savannas and the associated Indian River Lagoon watershed. These Basins were modeled utilizing ICPR Version 4. Consultant Cost: \$231,930.00		

**E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT**

(Complete one Section E for each key person.)

12. NAME <b>James Carnes III, PE</b>	13. ROLE IN THIS CONTRACT Sr. Project Manager/ Engineer	14. YEARS EXPERIENCE	
		a. TOTAL 20	b. WITH CURRENT FIRM 3
15. FIRM NAME AND LOCATION (City and State) CAPTEC Engineering, Inc. (Stuart, Florida)			
16. EDUCATION (Degree and Specialization) B.S. Mechanical Engineering, University of Central Florida, 2005		17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline) Professional Engineer in the State of Florida (License No. 82316)	
18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)			

Mr. Carnes has over 20 years of extensive experience and expertise in coordinating, planning, designing, estimating and preparing specifications for the construction of water treatment/distribution and wastewater treatment/collection systems. Mr. Carnes is a member of Florida Engineering Society Treasure Coast Chapter.

**19. RELEVANT PROJECTS**

	(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION (if applicable)
A.	<b>City of West Palm Beach Utilities Okeechobee Road Water and Sanitary Sewer Design (West Palm Beach, FL)</b>	Oct. 2022 to on-going	
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <span style="float:right">[X] Check if project performed with current firm</span> Mr. Carnes is the Sr. Project Manager/ Engineer for this current project providing utility engineering design, permitting, and bid phase services for improvements to the existing sanitary sewer utility system and the existing potable water utility system within Lakeview Avenue Right-of-Way (ROW) between S. Quadrille Blvd and Chase Street. All work will be performed along the Lakeview Avenue corridor and no temporary construction or permanent utility easements are anticipated to be required. The utility improvements consist of replacement of the existing 8", 10" and 12" Vitrified Clay Pipe (VCP) and the existing manholes with 12" pipe material on City of West Palm Beach's (WPB) Approved Products List and Precast Concrete Manholes along Lakeview Avenue between S. Dixie Highway and Chase Street. The CITY desires to replace the aging sanitary sewer system within proposed FDOT project corridor which includes gravity sewer mains, existing manholes, and existing services. The specific potable water distribution system improvements consist of the installation of new 8" DIP water main along Lakeview Avenue between the existing 12" DIP water main at S. Quadrille Blvd. and the existing 8" DIP water main on the west side of S. Dixie Highway. The Engineer will coordinate with adjacent developments along this rapidly improved downtown corridor in the City of WPB. Consultant Cost \$367,070.00		
B.	<b>Hegener Drive Phase 3 Extension and Tom Mackie/ Marshall Blvd. Improvements (Port St. Lucie, FL)</b>	April 2020 to on-going	
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <span style="float:right">[X] Check if project performed with current firm</span> Mr. Carnes is the Sr. Project Manager/ Engineer for Designer for the current Phase 3 project to provide stormwater management design for the roadway, utility water mains, and gravity sanitary sewer improvements along this three-road section corridor. Mr. Carnes oversees the preparation of the 100% design plans for this roadway to include drainage (including lakes), utility plans, irrigation and landscape design, and lake siting for roadway fill material. The drainage design is consistent with the SFWMD Conceptual Permit for Southern Grove. The drainage plan includes an equalizer pipe between lakes L22B and L24A. Utility design includes water mains, gravity sewer mains, a lift station, water/ sewer services to future parcel(s) and force mains as needed. It is anticipated that the parcels located to the north of the proposed East/ West Road #2 will be served by the existing lift station at the intersection of Tom Mackie Blvd. and Trade Center Dr. A lift station will be designed for the properties abutting the proposed portion of roadway south of E/W Road #2. Coordination with FPL is required for the design of power conduits to be included on the plans. The Lift Station requires 460 Volt, 3 phase power. Tom Mackie Blvd extension and E/W Road #2 will be located within a proposed 100-foot right-of-way (ROW). Marshall Parkway will be located within the existing 150-foot ROW. Tom Mackie Blvd. and E/W Road #2 are being designed with 10-foot public utility easements located outside of the ROW on both sides, 12-foot travel lanes, 6-foot paved shoulders, 8-foot-wide sidewalk on both sides of the ROW, street trees, main trunk-line drainage, and swale drainage. Marshall Parkway will be designed as a 4-lane median divided with 10-foot public utility easements located outside of the ROW on both sides, 12-foot travel lanes, 4-foot paved shoulders, 10-foot sidewalk on both sides of the ROW, street trees, and curb and gutter drainage. Irrigation design will be provided for street trees. Consultant Cost: \$586,471.00		
C.	<b>Peacock Blvd. Intersection Improvements (Port St. Lucie, FL)</b>	PROFESSIONAL SERVICES Nov. 2022 to on-going	CONSTRUCTION (if applicable)
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <span style="float:right">[X] Check if project performed with current firm</span> Mr. Carnes is the Sr. Project Manager/ Engineer for completing utility design and permitting for the roadway improvements including, intersection improvements with additional turn lanes, drainage modifications, signal head and mast arm relocations, phasing modifications, utility relocations, permitting and post design services. Consultant Cost: \$457,050.00		

**E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT**

(Complete one Section E for each key person.)

12. NAME <b>Teresa (Teri) Andre, P.E.</b>	13. ROLE IN THIS CONTRACT Sr. Project Manager/ Engineer	14. YEARS EXPERIENCE	
		a. TOTAL 27	b. WITH CURRENT FIRM 7

15. FIRM NAME AND LOCATION (City and State)  
CAPTEC Engineering, Inc. (Stuart, Florida)

16. EDUCATION (Degree and Specialization)  
B.S. Environmental Engineering, University of Florida, 1994

17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline)  
Professional Engineer in the State of Florida (License No. 54695)

18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)  
Mrs. Andrea has over 27 years of experience and expertise in stormwater analysis and modeling, land development design, permitting, utility design and modeling. Varied public and private sector projects encompassing multiple counties across Florida including outfall studies; stormwater retrofit projects; water quality studies; basin studies; conceptual stormwater analyses including pre-development modeling; multi-phase land development design and permitting; FEMA permitting; master utility plans; lift station design; Due Diligence studies; DRI submittals; RFP preparation; submittals and presentations. Member of FL Engineering Society (FES) Treasure Coast; 2003 Young Engineer of the Year; 2019 AutoCAD Civil 3-D Certification; FES Stormwater Management Design Course; FL Institute of Consulting Engineers; National Society of Professional Engineer

19. RELEVANT PROJECTS			
	(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION (if applicable)
A.	<b>Town of Sewall's Point North Sewall's Point Septic to Sewer (Stuart, FL)</b>	Mar. 2019–Jan. 2021	2020 – Jan. 2021
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <span style="float:right">[X] Check if project performed with current firm</span> Mrs. Andre was the Sr. Project Manager/ Engineer for recently completing the design, permitting, and bidding services for the septic to sewer conversion of 8 areas of low-pressure Force Mains. CAPTEC has attained a State Appropriations grant to remove the maximum number of residential and commercial properties from septic tanks to Martin County Utilities Sanitary Sewer System in North Sewall's Point Area. The residential properties were removed from existing septic tanks and tied into the newly constructed parallel low-pressure force mains which conveys all hookups to the County's Force Main within North Sewall's Point Road. The number of connections is dependent on the cost feasibility and property owner's interest in participation. These facilities have been constructed within the public rights-of-way and utility easements. It is expected that 207 ERCs (Family lots) will be connected to the Martin County Utilities Sanitary Sewer System. Permit applications were submitted to FDOT and FDEP and coordinated with Martin County Utilities. Consultant Cost \$110,875.00		
B.	<b>Martin County Old Palm City Neighborhood (Palm City, FL)</b>	Mar. 2018-Sept 2020	2020
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <span style="float:right">[X] Check if project performed with current firm</span> Mrs. Andre was the Sr. Project Manager/ Engineer for this recent project for providing design and modeling services to construct approximately 4,000 linear feet of piping of ditches that will be built along with the Old Palm City Vacuum Sanitary Sewer and roadway resurfacing improvements. The plans included hydraulic improvements for the existing backyard canals to carry stormwater flows away from currently inundated areas and redirect these flows to County owned land within the vicinity of the project and ultimately discharge treated stormwater to the South Fork of the St. Lucie River. Consultant Cost: \$ 98,710.00		
C.	<b>Martin County New Fairgrounds Site Water &amp; Sewer Study and ITS (Indiantown, FL)</b>	Feb. 2020 to on-going	
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <span style="float:right">[X] Check if project performed with current firm</span> Mrs. Andre is the Sr. Project Manager/ Engineer for preparing the Site Plan, permitting and on-site utilities & stormwater improvements for the Martin County Fairgrounds. In the past, CAPTEC prepared the Conceptual Design for an 8-inch water main and 8-inch force main extension to the Fairgrounds. The first phase will be permitted as Temporary Facilities Procedure which requires excavation/ fill permit and temporary parking. Consultant Cost: \$134,500.00		
D.	<b>Mapp Road Town Center/ Roadway Improvements (Palm City, FL)</b>	Nov. 2017 to Dec. 2020	2020
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <span style="float:right">[X] Check if project performed with current firm</span> Mrs. Andre was the Sr. Project Manager/ Engineer for completing the Mapp Road 'Gateway' Redevelopment project, which included Design (Complete Streets) for the reconstruction of Mapp Road with an urban/ curb and gutter roadway cross section, on street parallel parking, sidewalks, streetlights, hardscape and landscaping, drainage and other improvements. This project entailed completing the roadway engineering and design, utility coordination, surveying, environmental services, geotechnical engineering, traffic engineering, street lighting design, landscape and hardscape design, permitting, and bidding services. Post Design & CEI Services were provided during construction. This project required coordination of the design work with the Mapp Road Multi-Modal Roadway and the Mapp Road Storm Water Management (SWM) Projects that previously were completed. The Mapp Road Multi- Modal Roadway and the Mapp Road Stormwater Management Projects provided drainage engineering and design of the main "backbone" drainage lines and stormwater treatment for the Mapp Road Town Center Downtown Redevelopment in the Palm City CRA. CAPTEC previously provided the engineering services for 3,400 LF to accommodate Bike Lanes and resurfacing to widen Mapp Road. Consultant Cost: \$375,008.00		

**E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT**

(Complete one Section E for each key person.)

12. NAME <b>Steven Marquart, PE</b>	13. ROLE IN THIS CONTRACT Sr. Project Manager/ Engineer	14. YEARS EXPERIENCE	
		a. TOTAL 41	b. WITH CURRENT FIRM 8

15. FIRM NAME AND LOCATION (City and State)  
CAPTEC Engineering, Inc. (Stuart, Florida)

16. EDUCATION (Degree and Specialization) B.S. Civil Engineering, University of Florida, 1980	17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline) Professional Engineer in the State of Florida (License No. 34879)
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18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)  
Mr. Marquart has over 41 years of experience including site engineering, permitting, and construction administrative services for the installation of roadway, stormwater management, drainage, potable water and sanitary sewer utilities improvements for the initial and secondary phases of projects, as well as extensive experience in environmental, dredge and fill, Dept. of Environmental Protection, Dept. of Transportation, US ACOE, and various Water Management Districts permitting. Mr. Marquart is a Qualified Stormwater Management Inspector. Mr. Marquart also served as Project Manager for a fast-track CRA contract with the City of Stuart encompassing 5 neighborhood improvement areas.

**19. RELEVANT PROJECTS**

	(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION (if applicable)
A.	<b>Koa Bay Development fka Willow Lakes (Fort Pierce, FL)</b>	Nov. 2024 to on-going	
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Mr. Marquart is the Sr. Project Manager/ Engineer for this current to develop approximately 200-acre parcel to include a wave garden cove surf facility and water park facility with retail sites with mixed-use apartment and office units, residential and resort hotel uses, parking lots, other amenities and access roadways on to Midway Road. Services will include development of final engineering plans to include an overall stormwater management system, potable water and sanitary sewer systems, mass grading and drainage plans, offsite roadway improvements, and permitting services. CAPTEC has been currently acting as the Interim District Engineer for the Ka Bay Community Development District. Consultant Cost \$735,400.00		
B.	<b>Selvitz Road Culvert Replacement @ NSLRWCD Canal 102 (St. Lucie County, FL)</b>	Feb. 2019 to June 2021	
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Mr. Marquart was the Sr. Project Manager/ Engineer for this project that included the replacement of the existing drainage culvert under Selvitz Road in the NSLRWCD Canal 102 with roadway and adjacent canal channel restoration (grading, rip rap and sod) within 50 ft. from the culvert. This project has entailed attending meetings, preparing stormwater drainage engineering design plans, providing permitting services which applications were submitted to SFWMD, ACOE and the NSLRWCD and after the bid opening, the final "Approved for Construction" (AFC) Plans were prepared. Consultant Cost: \$73,335.00		
C.	<b>Stormwater Management Plan (Port St. Lucie, FL)</b>	Sept. 2020 to Oct. 2021	
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Mr. Marquart was the Sr. Project Manager/ Engineer for providing a review and updating the City's Stormwater Management Plan to confirm information is accurate and reflects current conditions; data in the text, figures, tables and appendices is accurate; maps, graphics and area descriptions are consistent with stormwater studies; project lists are prioritized according to scoring and ranking and the costs and funding is accurate and represents general engineering standards. Stormwater Presentation presented to City Council Consultant Cost: \$75,000.00		
D.	<b>Southport Backbone 24-inch Force Main project (Port St. Lucie, FL)</b>	Dec. 2017 – April 2020	
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Mr. Marquart was the Sr. Project Manager/ Engineer for completing the design, permitting, bidding and CEI services for the Southport Backbone Force Main Project for the City of Port St. Lucie, to replace an existing 12-inch force main. The +/-22,300 LF force main route begins at Tiffany Ave. and Highway U.S. 1 and continues south along Morningside Blvd. through the City's Saints' Golf Course, down Pine Valley Street to the Southport Wastewater Booster Pump Station. The route contains multiple horizontal directional drill installations including US 1/Tiffany Avenue, PSL Blvd/Morningside Blvd, and Westmoreland Blvd./Pine Valley Street. This project required minimal disruption to the residents and short-term closure of the Golf Course. Consultant Cost: \$611,765.00		



**E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT**

(Complete one Section E for each key person.)

12. NAME <b>Gary L.S. Jones, P.E.</b>	13. ROLE IN THIS CONTRACT Director of Construction Services	14. YEARS EXPERIENCE	
		a. TOTAL 42	b. WITH CURRENT FIRM 21

15. FIRM NAME AND LOCATION (City and State)  
CAPTEC Engineering, Inc. (Stuart, Florida)

16. EDUCATION (Degree and Specialization) Bachelor of Science in Civil Engineering, James Madison University, Harrisonburg Virginia; Broward Community College, Weston, FL	17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline) Professional Engineer in the State of Florida (License No. 51985)
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18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)  
Mr. Jones manages all construction projects and has over 42 years of experience in providing construction engineering and inspection (CEI) and management services highway, roadway, bridge and parking facility projects as well as drainage, water, wastewater, utility construction and infrastructure improvements. Mr. Jones is a member of the Florida Engineering Society (FES) Treasure Coast; 2019 Engineer of the Year (FES); FDOT Advanced MOT and LAP Certified; CTQP Quality Control Manager; CTQP Asphalt Paving; Level 1 & 2; IMSA Traffic Signal Inspection Level 1; Work Zone Safety Certification; Stormwater Management Inspector.

**19. RELEVANT PROJECTS**

	(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION (if applicable)
A.	<b>Booker Park Neighborhood CEI Services for Drainage Improvements (Indiantown, FL)</b>	Jan. 2022	2022 – June 2023
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE [X] Check if project performed with current firm Mr. Jones recently provided the overall CEI Project Management Services for the installation of drainage pipe, utility deflections, swale grading and driveway reconstruction within the Booker Park Subdivision; the installation of curb and sidewalk along Martin Luther King Blvd. with milling and pavement overlay, with pavement marking, on Martin Luther King Jr. Drive, Magnolia Street and Charleston Street; the construction of single and double course micro-surfacing on Palm Beach Street, SW 170 <sup>th</sup> Ave., SW 169 <sup>th</sup> Drive and SW 169 <sup>th</sup> Ave.; and the installation of sod at all construction locations. FDOT Grant Appropriations funding. Consultant Cost: \$165,100.00		
B.	<b>Indian River Veteran’s Memorial Park – TMDL Contract (Fort Pierce, FL)</b>	Nov. 2013-July 2016	Nov. 2015 – July 2016
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE [X] Check if project performed with current firm Mr. Jones was the Construction Director/ Manager for providing construction inspection services for upgrading the Indian River Veterans Memorial Park to better accommodate handicapped guests and address flooding issues. Project included designing Park improvements so as to deter flooding and improve ADA accessibility and usability by incorporating lighting, irrigation, drainage, paver walkways, concrete pavement, asphalt, concrete curbs and walls and grand entrances. Provided a stormwater treatment and nutrient load reduction plan for water quality benefits to the Indian River Lagoon including lakes, bioswales, fountains and flocc logs. This project entailed remodeling the Community Center to include ADA restrooms accessibility. The initial phase included the replacement of a sanitary sewer line to service the County Center while the facility was in operation. CEI services were provided to monitor work being performed, approve payment applications, and prepare final certification upon project completion. Consultant Cost: \$ 192,500.00		
C.	<b>Tradition Roadway Renewal Improvements in the Tradition Area (Port St. Lucie, FL)</b>	July 2015 to November 2017	2015 to 2017
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE [X] Check if project performed with current firm Mr. Jones provided CEI services for the correction of life safety issues, milling, resurfacing, and restoration of roadway striping for four of the roadways within the Tradition Development, including Village Parkway, Community Boulevard, Westcliffe Lane, and Tradition Parkway. Previously, from 2008 to 2010, CAPTEC completed design and permitting services and Mr. Jones provided CEI services for various arterial, collector, and subdivision roadway projects within the Tradition Subdivision, Port St. Lucie, FL. The design varied but generally included roadway/roundabouts, stormwater, and utility. CEI services included coordinating with various Sub-Consultants, weekly meetings, coordinating with Contractor/ Sub-Contractors, and shop drawing review. Final certification was prepared upon completion of construction for individual roadways/ plats, as well as CDD coordination / submittal. Consultant Cost: \$ 269,445.00		
D.	<b>Floresta Drive and Southbend Boulevard Roundabout Project for the City of Port St. Lucie, (Port St. Lucie, FL)</b>	Aug. 2010-June 2012	Aug. 2011-June 2012
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE [X] Check if project performed with current firm Mr. Jones was the Construction Director/ Manager for this project which entailed the replacement of sanitary sewer, water main and storm water improvement, within an old neighborhood, within the City of Stuart. This was a Grant funded project. Provided field inspections, assisted City with CDBG contract reporting activities, daily observations of the CONTRACTOR’S Maintenance of Traffic set up and provided comments on any needed modifications or adjustments, observed testing, shop drawing review / approval, conduct weekly / bi-monthly progress meetings, reviewed pay application, conducted final inspection, reviewed/ approved shop drawings, and provided final certification. Consultant Cost: \$ 103,000.00.		

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> (Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)		20. EXAMPLE PROJECT KEY NUMBER <b>1</b>
21. TITLE AND LOCATION (City and State) <b>South Sewall's Point Road Roadway Improvements (Stuart, FL)</b>		22. YEAR COMPLETED PROFESSIONAL SERVICES 2019 to Jul 2023 (Ph 1); Feb. 2021 to ongoing (Ph 2); Jan. 2021 to ongoing (Ph 3) CONSTRUCTION (if Applicable)
23. PROJECT OWNER'S INFORMATION		
a. PROJECT OWNER Town of Sewall's Point	b. POINT OF CONTACT Mr. Robert Daniels, Town Manager	c. POINT OF CONTACT TELEPHONE NUMBER (772) 287-2455 ext. 12
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (include scope, size, and cost)		

CAPTEC prepared the construction plans for paving, grading and drainage improvements for South Sewall's Point roadways and assisted in the CEI services for the reconstruction of these roadways. Part of these improvements included the construction of a three-part BMP treatment train that includes: 1) an exfiltration/underground storage component that will collect sheet flowing rainwater from the Mandalay and Marguerita neighborhoods; 2) two outfall boxes that will receive any excess rainwater that does not percolate into the groundwater table; and 3) a stormwater diversion from the baffle boxes to a vegetated wet retention area/Stormwater Treatment Area (STA) along South Sewall's Point Road adjacent to the Mandalay and Marguerita subdivisions. These improvements were necessary to prevent roadway flooding. The wet vegetated retention area provides 3.20 ac-ft. of retention storage plus sediment removal prior to discharge. This stormwater system provides water quality treatment for the sheet flowing rainwater that has historically collected on the roadways causing nuisance to severe flooding during major storms. This project entailed raising the Coastal Roadway 1.5 feet, known as South Sewall's Point Road Phase 1 and utilized HMGP funds. CAPTEC is currently utilizing the 2<sup>nd</sup> HMGP funds for the same Coastal Roadway (South Sewall's Point Road Phase 3). These resiliency projects have pump backups, road widening, Grant Administration, monitoring, permitting, and watermain and sanitary sewer installation, which CEI services by CAPTEC are being performed. Consultant Fee: \$148,982.00; Construction Cost: \$10 Million (not built yet)



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME CAPTEC Engineering, Inc.	(2) FIRM LOCATION (City and State) 301 NW Flagler Avenue Stuart, FL 34994	(3) ROLE Civil Engineering Design/ Utility and Construction Inspection Services for the City of Port St. Lucie
b.	Hobe Sound Environmental Consultants, Inc..	Hobe Sound, FL	Environmental Services
c.	Andersen Andre Consulting Engineers, Inc.	Port St. Lucie, FL	Geotechnical Services
b.	Michael Flaugh Landscape Architect	Stuart, FL	Landscaping Services

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> (Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)		20. EXAMPLE PROJECT KEY NUMBER <b>2</b>
21. TITLE AND LOCATION (City and State) <b>Mapp Road Town Center and Roadway Improvements (Palm City, FL)</b>		22. YEAR COMPLETED PROFESSIONAL SERVICES: 2020 CONSTRUCTION (if Applicable): On-going

23. PROJECT OWNER'S INFORMATION		
a. PROJECT OWNER Martin County Engineering Dept.	b. POINT OF CONTACT Mrs. Susan Kores, PE, Project Manager	c. POINT OF CONTACT TELEPHONE NUMBER (772) 463--2848

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

CAPTEC has completed the Mapp Road 'gateway' redevelopment project, which includes Design (complete streets) for the reconstruction of Mapp Road with an urban/ curb and gutter roadway cross section, on street parallel parking, sidewalks, streetlights, hardscape and landscaping, drainage, and other improvements. This project has entailed completing the roadway engineering and design, utility coordination, surveying, environmental services, geotechnical engineering, traffic engineering, street lighting design, landscape, and hardscape design, permitting, and bidding services. Post Design services were provided.

This project required the coordination of the design work with the Mapp Road Multi-Modal Roadway and the Mapp Road Storm Water Management (SWM) Projects that previously were completed. The Mapp Road Multi-Modal Roadway and the Mapp Road Stormwater Management Projects provided drainage engineering and design of the main "backbone" drainage lines and the storm water treatment for the Mapp Road Town Center Downtown Redevelopment in the Palm City CRA.

CAPTEC previously provided the engineering and drafting services for 3,400 LF of this roadway to accommodate Bike Lanes and resurfacing to widen Mapp Road from south of Martin Downs Blvd. to north of Martin Highway, in a FDOT LAP Grant. CAPTEC also provided Roadway Resurfacing Plans for 2.8 miles of milling and overlay / resurfacing to widen roadway from S.R. 714 to SW Bridgeway Street in Palm City. Consultant Fee: \$373,241.00; Construction Cost: \$5,686,311.00



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT		
a. (1) FIRM NAME CAPTEC Engineering, Inc.	(2) FIRM LOCATION (City and State) 301 NW Flagler Avenue Stuart, FL 34994	(3) ROLE Civil Engineering Roadway Design, Drainage, Utility and Permitting Services For Martin County
b. (1) FIRM NAME Hobe Sound Environmental Consultants, Inc.	(2) FIRM LOCATION (City and State) Hobe Sound, FL	(3) ROLE Environmental Services
c. (1) FIRM NAME Andersen Andre Consulting Engineers, inc.	(2) FIRM LOCATION (City and State) Port St Lucie, FL	(3) ROLE Geotechnical Engineering Services

**F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT**  
 (Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER

3

21. TITLE AND LOCATION (City and State)

**Indian River Veteran's Memorial Park for the City of Fort Pierce in Fort Pierce, Florida**

22. YEAR COMPLETED

PROFESSIONAL SERVICES

Dec. 2013 to July 2016

CONSTRUCTION (if Applicable)

2015 and 2016

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER

City of Fort Pierce Engineering Dept.

b. POINT OF CONTACT

Mr. John (Jack) Andrews, PE

c. POINT OF CONTACT TELEPHONE NUMBER


(772) 460-2200 ext. 3773

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

CAPTEC was contracted to provide design, permitting and construction inspection services to upgrade the Indian River Veteran's Memorial Park in Fort Pierce to better accommodate handicapped guests and address flooding issues. Project included designing Park improvements so as to deter flooding and improve ADA accessibility and usability by incorporating lighting, irrigation, drainage, paver walkways, concrete pavement, asphalt, concrete curbs and memorial walls and grand entrances. Provided a stormwater treatment and nutrient load reduction plan for water quality benefits to the Indian River Lagoon including lakes, bioswales, fountains and flocc logs. This project entails remodeling the Community Center to include ADA restrooms accessibility. The initial phase of the project included the replacement of a sanitary sewer line to service the County Center while the facility was in operation. CEI services were provided to approve drainage, monitor work being performed, approved payment applications and prepared final certification upon project completion. This project secured several FDEP / TMDL / 319 / License Plate / St. Lucie River Issues / CDBG grants. Consultant Cost: 192,500.00



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a. (1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
CAPTEC Engineering, Inc. 	301 NW Flagler Avenue Stuart, FL 34994	Civil Engineering Design/ Permitting and Construction Inspection Services for the City of Fort Pierce Engineering Dept.
Andersen Andre Consulting Engineers, Inc.	Port St. Lucie, FL	Geotechnical Engineering Services
Wojcieszak & Associates, Inc..	Stuart, FL	Electrical Services
NorthStar Geomatics, Inc.	Port St. Lucie, FL	Surveying Services

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> (Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)	<b>20. EXAMPLE PROJECT KEY NUMBER</b> <b>4</b>
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<b>21. TITLE AND LOCATION (City and State)</b> <b>Southport Backbone 24" Force Main Project (Port St. Lucie, FL)</b>	<b>22. YEAR COMPLETED</b>	
	PROFESSIONAL SERVICES Dec. 2017 to April 2020	CONSTRUCTION (if Applicable) January 2019 to April 2020

<b>23. PROJECT OWNER'S INFORMATION</b>		
<b>a. PROJECT OWNER</b> City of Port St. Lucie utility Systems Dept.	<b>b. POINT OF CONTACT</b> Mr. David Garland, P.E., Project Manager	<b>c. POINT OF CONTACT TELEPHONE NUMBER</b> (772) 807-4414

**24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (include scope, size, and cost)**  
 CAPTEC provided design, permitting, bidding services and completed construction engineering inspection services for the City of Port St. Lucie's Southport Backbone Force Main Project to replace an existing 12-inch force main, with 24-inch force main, to increase capacity and operating pressures. The approximate 22,300 ft. force main route begins at Tiffany Avenue and Highway U.S. 1, continues south along Morningside Blvd. through the City's Saints' Golf Course, down Pine Valley Street to the Southport Wastewater Booster Pump Station. The route contains multiple horizontal directional drill installations and roadway crossings, including Highway U.S. 1 at Tiffany Avenue/ Lyngate Drive, Port St. Lucie Blvd. at Morningside Blvd., and Westmoreland Blvd. at Pine Valley Street. This project required minimal disruption to the residents. CAPTEC prepared an FDOT permit application for the installation of a CITY wastewater collection / transmission system in the FDOT rights of way along the force main route and submitted to the City of Port St. Lucie for review prior to submitting to FDOT permitting agency. This project utilized fusible PVC pipe which provided significant savings to PSL Utilities. Consultant Cost: \$611,755.00; Construction Cost: \$5 Million



<b>25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT</b>		
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<b>a.</b>	(1) FIRM NAME CAPTEC Engineering, Inc.	(2) FIRM LOCATION (City and State) 301 NW Flagler Avenue Stuart, FL 34994	(3) ROLE Civil Engineering Design/ Utility and Construction Inspection Services for the City of Port St. Lucie
<b>b.</b>	Andersen Andre Consulting Engineers, Inc..	Port St. Lucie, FL	Geotechnical Engineering Services
<b>c.</b>	Betsy Lindsay, Inc. (dba Haley Ward)	Stuart, FL	Surveying Services

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> (Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)	20. EXAMPLE PROJECT KEY NUMBER 5
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21. TITLE AND LOCATION (City and State) <b>Becker Road Corridor Widening (Port St. Lucie, Florida)</b>	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES 2010	CONSTRUCTION (if Applicable) 2013

23. PROJECT OWNER'S INFORMATION		
a. PROJECT OWNER City of Port St. Lucie Engineering Dept.	b. POINT OF CONTACT Ms. Patricia Roebing, P.E., City Engineer	c. POINT OF CONTACT TELEPHONE NUMBER (772) 871-5177

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

CAPTEC provided Design & Permitting for the widening of this 3.6-mile major arterial project. The project included creating a gateway atmosphere/ Complete Street Design for this section of roadway that connects recently constructed interchanges at the Florida's Turnpike and I-95. Roadway design services included widening from a 2-Lane Rural Undivided Roadway to a 4-Lane Divided Urban Arterial. Modifications were required to existing utility lines. Permitting was obtained from SFWMD, ACOE, FWCC & FDEP. Design included 5 new Signalized Intersections with Pedestrian/ Street lighting along the entire Corridor. Stormwater improvements included addition/ expansion of 10 Stormwater Detention Ponds. The project was constructed in 4 Segments and the improvements included sidewalk installation. CAPTEC is familiar with what the City of Port St. Lucie staff was looking for in the plan design/ making sure the roadways and drainage meets the City criteria and are safe corridors, set-up to move existing and future heavy volumes of traffic between major St. Lucie County and State(FDOT/Federal) roads. Consultant Cost: \$1,885,000.00




25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT			
a.	(1) FIRM NAME CAPTEC Engineering, Inc.	(2) FIRM LOCATION (City and State) 301 NW Flagler Avenue Stuart, FL 34994	(3) ROLE Civil Engineering Roadway Design, Utility, Drainage and Permitting Services for the City of Port St. Lucie
b.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> (Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)		20. EXAMPLE PROJECT KEY NUMBER <b>6</b>
21. TITLE AND LOCATION (City and State) <b>East Lake Village Phases I &amp; II and Mixed-Use Project (Port St. Lucie, FL)</b>		22. YEAR COMPLETED PROFESSIONAL SERVICES: 2011 - 2012 CONSTRUCTION (if Applicable): 2011-2012
23. PROJECT OWNER'S INFORMATION		
a. PROJECT OWNER City of Port St. Lucie CRA Dept.	b. POINT OF CONTACT Mr. Frank Knott, Project Manager	c. POINT OF CONTACT TELEPHONE NUMBER (772) 344-4290
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (include scope, size, and cost)		

CAPTEC setup a Special Assessment District (SAD) and a Community Development district (CDD) for the Port St. Lucie Community Redevelopment Agency (CRA) for this project. CAPTEC prepared site design, permitting and construction plans/ CEI services for the overall 98-acre site; PUD Master Plan for residential lots consisting of site grading, water, sewer, drainage facilities, stormwater management and pavement design information. Systems were designed to tie in to the new master infrastructure systems constructed in Hillmoor Drive, Grand Drive, Lennard Road and Jennings Road area. This included 95 single family residences, 407 multi-family units, 70,000 s.f. office / retail commercial building, and a 288-seat restaurant; site design, permitting, and construction administration services for roadway, drainage, and water / sewer construction. This project required permits with the City of Port St. Lucie, SFWMD, ACOE and various Fish & Wildlife services were provided. The project included the creation of wetlands, a Greenway/ Blueway system and the Woodstork Trail. Consultant Cost: \$252,500.00; Construction Cost: \$1.4 Million




25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT			
a.	(1) FIRM NAME CAPTEC Engineering, Inc. 	(2) FIRM LOCATION (City and State) 301 NW Flagler Avenue Stuart, FL 34994	(3) ROLE Civil Engineering Design and CEI Services for the City of Port St. Lucie
b.	Andersen Andre Consulting Engineers, Inc.	Port St. Lucie, FL	Geotechnical Services
c.	Hobe Sound Environmental Consultants, inc.	Hobe Sound, FL	Environmental Services
d.	Wojcieszak & Associates, Inc.	Stuart, FL	Electrical Engineering Services

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> (Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)		20. EXAMPLE PROJECT KEY NUMBER 7
21. TITLE AND LOCATION (City and State) <b>Indian Trail Improvement District Traffic Calming and Stormwater Management Services (West Palm Beach, FL)</b>		22. YEAR COMPLETED PROFESSIONAL SERVICES: Nov. 2015 to on-going CONSTRUCTION (if Applicable): On-going
23. PROJECT OWNER'S INFORMATION		
a. PROJECT OWNER Indian Trail Improvement District (ITID)	b. POINT OF CONTACT Mr. Jay Foy, District Engineer	c. POINT OF CONTACT TELEPHONE NUMBER (561) 242-0028
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (include scope, size, and cost)		

**ITID is a State of Florida 298 District.** CAPTEC performed a traffic calming study within the M-1 and M-2 Drainage Basin and reviewed conceptual traffic calming measures at intersection locations within the district boundaries. There are 71 intersections in this area. Reviewed traffic accident data available on these intersections. performed a visual field review and obtained photo documentation of the existing conditions. Based on the findings, a traffic calming plan and report with conceptual traffic calming and safety improvements in the vicinity of these intersections were prepared. CAPTEC utilized the Traffic Counters/Velocity equipment to measure traffic volume and vehicle speed on roadways and to monitor traffic calming improvements for effectiveness. These improvements included mid-block island/ speed tables, roundabouts and raised median approaches at intersections with pavement marking enhancement. Attended public meetings to obtain feedback for the development of the final traffic calming plan. Currently working with ITID and Palm Beach County to obtain FDOT/ Federal Grants to pay for these improvements unique to rural communities. CAPTEC is designing R3 Roadway Plans for 37,981 feet (12 roadways) that will convert unpaved roads to paved roadways for a total of 7-miles. The roadway designs include two (2) 11-foot lanes and rural swale for drainage, 5-foot sidewalk on one side were existing and driveway adjustments. CAPTEC is also providing CEI services for the removal of existing speed bumps and layout of new speed bump locations, milling and paving, striping and sign installations. These services include scheduling, conducting and providing minutes of the Pre-Construction Conference, shop drawings review and approval, MOT review and recommendations, and daily setup/ removal, reviewing and providing recommendations for monthly pay applications, change orders, time extensions, conducting progress meetings, providing minutes of meetings, providing daily reports and photographs to document progress, review and approve final construction as-built drawings completed and provided by the construction Contractor. CAPTEC will ensure all constructed sidewalks meet ADA guidelines, will review and monitor the Contractor's erosion control plan, and provide final Certification of the project upon completion of the work. CAPTEC provides District Engineering support on Stormwater Management items which entailed the updating of the GIS LIDAR Data by FEMA to remap this rural area of Palm Beach County. This remapping, with the assistance of **Sub-Consultant Team Member NorthStar Geomatics, Inc.** removed substantial homesites from the FEMA Area Zone A, Flood Zones, potentially removing the need for flood insurance for a substantial number of residents. CAPTEC also reviews all transportation items for the District relative to slope protection along canals, pipe size improvements, roadway designs, infrastructure improvements and stormwater treatment lakes planned for the various major arterial roadways and provides CEI Services. CAPTEC assisted the Treasure Coast Regional Planning Council with completing a Mobility Study for ITID. Consultant Fee: \$1.5 Million +; Construction Cost: \$80 Million



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT			
a.	(1) FIRM NAME CAPTEC Engineering, Inc. 	(2) FIRM LOCATION (City and State) 301 NW Flagler Avenue Stuart, FL 34994	(3) ROLE Civil Engineering Design/ Utility and Construction Inspection Services for the Indian Trail Improvement District
b.	(1) FIRM NAME NorthStar Geomatics, Inc.	(2) FIRM LOCATION (City and State) Port St. Lucie, FL	(3) ROLE Surveying Services
c.	(1) FIRM NAME Hobe Sound Environmental Consultants, Inc.	(2) FIRM LOCATION (City and State) Hobe Sound, FL	(3) ROLE Environmental Services



**F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT**

20. EXAMPLE PROJECT KEY NUMBER

8

21. TITLE AND LOCATION (City and State)

**Wilderness Trail Phases 1-3 (Port St. Lucie, Florida)**

PROFESSIONAL SERVICES

Oct. 2020 to  
on-going

22. YEAR COMPLETED

CONSTRUCTION (if Applicable)

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER

City of Port St. Lucie Parks & Recreation Dept.

b. POINT OF CONTACT

Ms. Kelly Boatwright, Project Manager

c. POINT OF CONTACT TELEPHONE NUMBER

(772) 871-5009

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

CAPTEC recently developed a Concept Plan and is in the final design and permitting phase for this project in the City of Port St. Lucie which entails final design of this Multi-modal Park Trail Project consisting of a multi-use path/trail improvements for 1.7-mile corridor on Westmoreland Blvd. These improvements will consist of 10-foot-wide concrete multi-modal sidewalk trail along Cambridge Blvd. with culvert crossings, boardwalk, on-street parking, Public Art Street markings across Cambridge Drive at 8 cross-streets, Park Benches and Trail amenities, Neighborhood Park Signs with four sided Kiosks, and animal Information bollards, littoral shelves, bioswales and a Restroom/ Pavilion facility. Consultant Fee: \$546,855.00; Construction Cost: \$3 Million



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT


a.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
	CAPTEC Engineering, Inc.	301 NW Flagler Avenue Stuart, FL 34994	Civil Engineering Design, Permitting and Bidding Services for the City of Port St. Lucie Parks & Rec. Dept.
b.	Betsy Lindsay, Inc. (dba Haley Ward)	Stuart, FL	Surveying Services
c.	Andersen Andre Consulting Engineers, Inc.	Port St. Lucie, FL	Geotechnical Services
d.	Hobe Sound Environmental Consultants, Inc.	Hobe Sound, FL	Environmental Services
e.	Michael Flough Landscape Architect	Stuart, FL	Landscape Services
f.	N2 Architects	Stuart, FL	Architectural Services

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> (Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)		20. EXAMPLE PROJECT KEY NUMBER <b>9</b>
21. TITLE AND LOCATION (City and State) <b>Hegener Drive Phase 3 Extension and Tom Mackie/ Marshall Blvd. Improvements (Port St. Lucie, FL)</b>		22. YEAR COMPLETED PROFESSIONAL SERVICES April 2020 to on-going CONSTRUCTION (if Applicable)
23. PROJECT OWNER'S INFORMATION		
a. PROJECT OWNER City of Port St. Lucie Public Works Dept.	b. POINT OF CONTACT Mr. Frank Knott, Project Manager	c. POINT OF CONTACT TELEPHONE NUMBER (772) 344-4290

CAPTEC prepared 100% design plans for this roadway to include drainage (including lakes), utility plans, irrigation and landscape design, and lake siting for roadway fill material. The drainage design was consistent with the South Florida Water Management District (SFWMD) Conceptual Permit for Southern Grove. The drainage plan included an equalizer pipe between lakes L22B and L24A. Utility design included water mains, gravity sewer mains, a lift station, water, and sewer services to future parcel(s) and force mains as needed. It is anticipated that the parcels located to the north of the proposed East/ West Road #2 will be served by the existing lift station at the intersection of Tom Mackie Blvd. and Trade Center Dr. A lift station was designed for the properties abutting the proposed portion of roadway south of E/W Road #2.

A service area analysis for the lift station was done to potentially include future land south of Marshall Parkway. Additionally, coordination with Florida Power and Light (FPL) was needed for the design of power conduits to be included on the plans. The proposed Lift Station required 460 Volt, 3 phase power. Tom Mackie Blvd extension and E/W Road #2 will be located within a proposed 100-foot right-of-way. Marshall Parkway will be located within the existing 150-foot right-of-way.

Tom Mackie Blvd. and E/W Road #2 have been designed with 10-foot public utility easements located outside of the right-of-way (ROW) on both sides, 12-foot travel lanes, 6-foot paved shoulders, 8-foot-wide sidewalk on both sides of the ROW, street trees, main trunk-line drainage, and swale drainage. Marshall Parkway is designed as a 4-lane median divided with 10-foot public utility easements located outside of the ROW on both sides, 12-foot travel lanes, 4-foot paved shoulders, 10-foot sidewalk on both sides of the ROW, street trees, and curb and gutter drainage. Irrigation design was provided for street trees. Consultant Fee: \$759,347.00

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT			
a.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
	CAPTEC Engineering, Inc. 	301 NW Flagler Avenue Stuart, FL 34983	Civil Engineering Design, Permitting and Utility Services hired by the City of Port St. Lucie Public Works Dept.
b.	Betsy Lindsay, Inc. (dba Haley Ward)	Stuart, FL	Surveying Services
c.	Andersen Andre Consulting Engineers, Inc.	Port St. Lucie, FL	Geotechnical Services
d.	Wojcieszak & Associates, Inc.	Stuart, FL	Electrical Services
e.	Michael Flaugh Landscape Architect	Stuart, FL	Landscape Services

<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> (Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)	<b>20. EXAMPLE PROJECT KEY NUMBER</b> 10
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<b>21. TITLE AND LOCATION (City and State)</b> <b>City of Port St. Lucie Master Stormwater Plan (Port St. Lucie, Florida)</b>	<b>22. YEAR COMPLETED</b>	
	PROFESSIONAL SERVICES Jul. 2015 – Nov. 2017	CONSTRUCTION (if Applicable) 2015-2017

<b>23. PROJECT OWNER'S INFORMATION</b>		
<b>a. PROJECT OWNER</b> City of Port St. Lucie Public Works Dept.	<b>b. POINT OF CONTACT</b> Mr. John Dunton, Deputy Public Works Director	<b>c. POINT OF CONTACT TELEPHONE NUMBER</b> (772) 344-4035

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

CAPTEC developed a “City of Port St. Lucie Stormwater Master Plan” that was consistent with the adopted goals, objectives and programs of the City Council and Public Works Department. The Stormwater Master Plan (SWMP) provided a general overview of the City’s Stormwater Systems and an outline of its needs. The submittal included comprehensive summary of previous stormwater modeling and results, a narrative and a map of the various basins. The SWMP analyzed the existing stormwater system, the historic modeling performed, and outlined the major basins and sub-basins. The project area included the entire City of Port St. Lucie and outlying areas that affect the City’s stormwater system.

The goals of this SWMP are to:

- reduce flood damage, including damage to life and property;
- minimize, to the extent practical, any increase in stormwater runoff from any new development;
- reduce soil erosion from any development or construction project;
- assure the adequacy of existing and proposed culverts and bridges, and other in-stream structures;
- maintain groundwater recharge;
- prevent, to the greatest extent feasible, an increase in nonpoint pollution;
- maintain the integrity of stream channels for their biological functions, as well as for drainage;
- minimize pollutants in stormwater runoff from new and existing developments to restore, enhance, and maintain the chemical, physical, and biological integrity of the waters of the state, to protect public health, to safeguard fish and aquatic life and scenic and ecological values, and to enhance the domestic, municipal, recreational, industrial, and other uses of water;
- protect public safety through the proper design and operation of stormwater basins.

The overall SWMP incorporated various system components including: The City of Port St. Lucie Major Basin Areas (North Port St. Lucie/ Sharret, Eastern Watershed, Midport, Cameo and Monterrey and C-24 Basins, Watersheds A-B-C, and D, Central Watershed, Veterans Memorial Watershed), and historic inflows into and through the City Limits from the North Fork St. Lucie River, SFWMD C-23 and C-24 Canals, St. Lucie County and the northern area in the water control districts (North St. Lucie River Water Control District, Tradition CDD, Southern Grove CDD, St. Lucie West Services District, Ft. Pierce Farms Water Control District).

“Water Quality” issues were also addressed relative to possible changes to the Florida Department of Environmental Protection (FDEP) Basin Management Action Plan (BMAP) relative to nitrogen, phosphorous, total suspended solids, heavy metals and fecal coliform. Recommendations will be provided for reducing pollutants and contaminants. Other best management practices were addressed included: water farming, septic tank elimination, National Point Discharge Elimination System (NPDES), maintenance (canals, lakes, stormwater treatment areas), wetlands, pump stations, stabilization, actuators, swale liners, litter, waste control, data collection for improvements, maintenance activities, and monitoring of permanent and temporary systems, salt water intrusion and hazardous materials.

Consultant Cost: \$24,500.00

<b>25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT</b>		
<b>a. (1) FIRM NAME</b> CAPTEC Engineering, Inc.	<b>(2) FIRM LOCATION (City and State)</b> 301 NW Flagler Avenue Stuart, FL 34994	<b>(3) ROLE</b> Study prepared for the City of Port St. Lucie Public Works Dept.



**G. KEY PERSONNEL PARTICIPATION IN EXAMPLE PROJECTS**

26. NAMES OF KEY PERSONNEL (From Section E, Block 12)	27. ROLE IN THIS CONTRACT (From Section E, Block 13)	28. EXAMPLE PROJECTS LISTED IN SECTION F (Fill in "Example Projects Key" section below before completing table. Place "X" under project key number for participation in same or similar role.)												
		1	2	3	4	5	6	7	8	9	10	11	12	
Joseph W. Capra, PE	Principal in Charge/ QC	X	X	X	X	X	X	X	X	X	X	X		
Thomas (TJ) Shaw, PE	Project Design Engineer/ Manager	X	X	X					X	X	X	X		
James Carnes III, PE	Sr. Project Manager/ Engineer	X							X	X	X			
Teresa (Teri) Andre. PE	Sr. Project Manager/ Engineer	X	X									X		
Steven Marquart, PE	Sr. Project Manager/ Engineer				X	X						X		
Gary L.S. Jones, PE	Director of Construction Services	X	X	X	X	X	X	X	X	X	X			

**29. EXAMPLE PROJECTS KEY**

NO.	TITLE OF EXAMPLE PROJECT (FROM SECTION F)	NO.	TITLE OF EXAMPLE PROJECT (FROM SECTION F)
1	S. Sewall's Point Road Roadway Improvements	6	East Lake Village Improvements
2	Mapp Road Town Center and Roadway Improvements	7	Indian Trail Improvement District Traffic Calming & Stormwater Management
3	Indian River Veteran's Memorial Park	8	Wilderness Trail Phase 1-3
4	Southport Backbone 24-inch Force Main	9	Hegener Drive Phase 3 Extension and Tom Mackie/ Marshall Blvd. Improvements
5	Becker Road Corridor Widening	10	City of Port St. Lucie Master Stormwater Plan

**H. ADDITIONAL INFORMATION**

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

**I. AUTHORIZED REPRESENTATIVE**

The foregoing is a statement of facts.

31. SIGNATURE

32. DATE

August 19, 2025

33. NAME AND TITLE

Joseph W. Capra, P.E., President

# ARCHITECT – ENGINEER QUALIFICATIONS

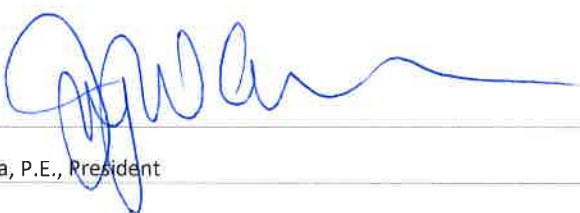
1. SOLICITATION NUMBER District Engineering Services

## PART II – GENERAL QUALIFICATIONS

2a. FIRM (OR BRANCH OFFICE) NAME <b>CAPTEC Engineering, Inc.</b>			3. YEAR ESTABLISHED <b>1996</b>	4. DUNS NUMBER <b>969867027</b>
2b. STREET <b>301 NW Flagler Avenue</b>			5. OWNERSHIP	
2c. CITY <b>Stuart</b>			2d. STATE <b>FL</b>	2e. ZIP CODE <b>34994</b>
6a. POINT OF CONTACT NAME AND TITLE <b>Joseph W. Capra, P.E., President</b>			a. TYPE <b>Corporation</b>	
6b. TELEPHONE NUMBER <b>(772) 692-4344</b>		6c. E-MAIL ADDRESS <b>jcapra@gocaptec.com</b>		
8a. FORMER FIRM NAME(S) (if any)			8b. YR. ESTABLISHED	8c. DUNS NUMBER
7. NAME OF FIRM (if block 2a is a branch office)				

9. EMPLOYEES BY DISCIPLINE				10. PROFILE OF FIRM'S EXPERIENCE AND ANNUAL AVERAGE REVENUE FOR LAST 5 YEARS		
a. Function Code	b. Discipline	c. No. of Employees		a. Profile Code	b. Experience	c. Revenue Index Number (see below)
		(1) Firm	(2) Branch			
02	Administrative	4		C10	Commercial, low rise	1
08	CADD Technician	4		C15	Construction Management	1
12	Civil Engineer	6		C18	Cost Estimating	1
15	Construction Inspector	3		D04	Design-Build	1
				H07	Highways	3
				H11	Housing – Multi-Family	3
				I01	Industrial	2
				O01	Office Buildings	2
				P04	Pipelines (Gas)	3
				P06	Planning	1
				S11	Sustainable Design	1
				S13	Stormwater Facilities	3
				U02	Urban Renewal	1
				W02	Water Resources	2
				W03	Water Supply	2
<b>TOTAL</b>		<b>17</b>				

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

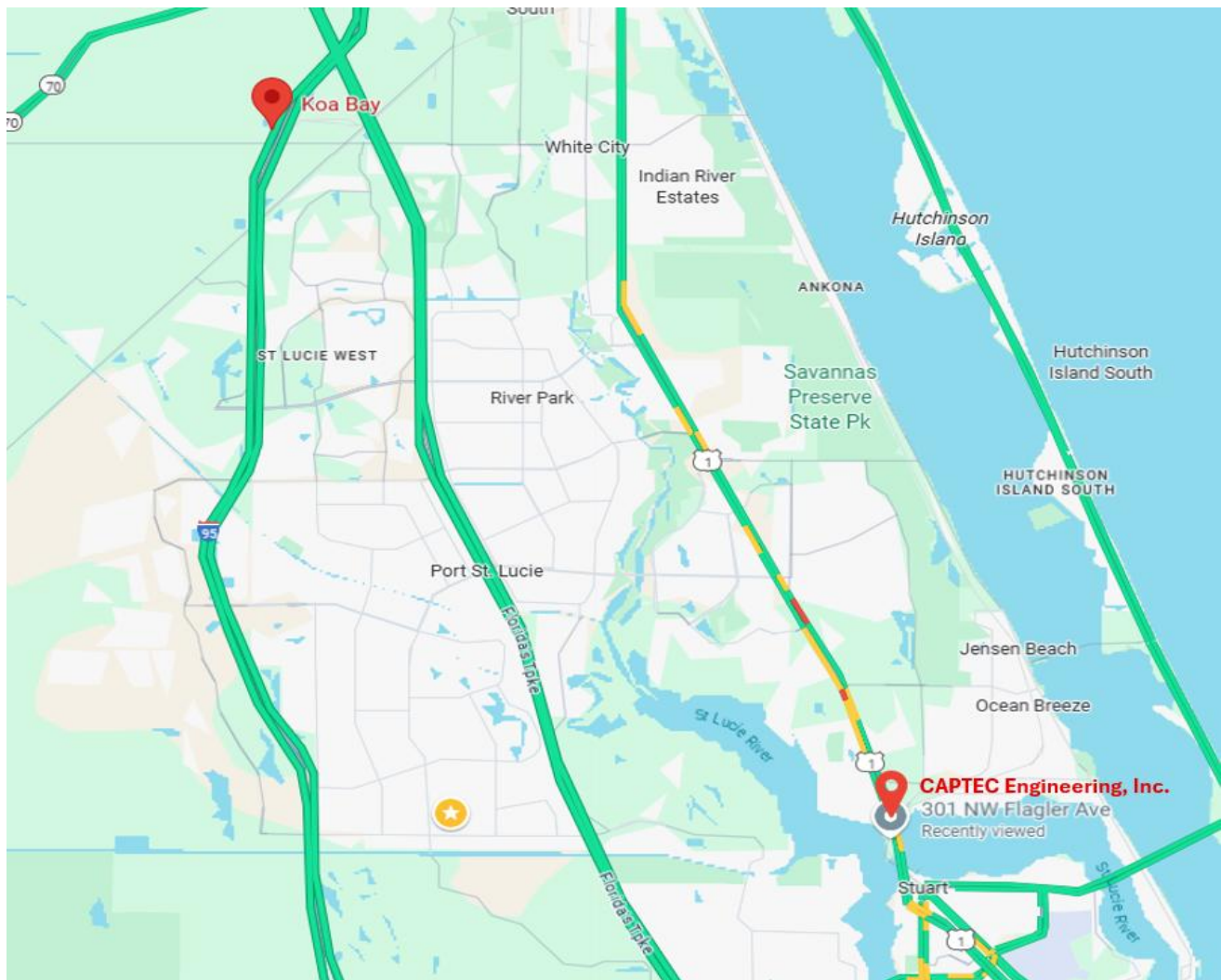
12. AUTHORIZED REPRESENTATIVE The foregoing is a statement of facts.		b. DATE
a. SIGNATURE 	August 22, 2025	
c. NAME AND TITLE <b>Joseph W. Capra, P.E., President</b>		

### 3) GEOGRAPHIC LOCATION



**CAPTEC'S** office, located at 301 NW Flagler Avenue, is centrally located on the Treasure Coast in the City of Stuart's CRA area, and is approximately 30 minutes from the Koa Bay Community Development District. Our location allows for quick response and facilitates our ability to attend impromptu, as well as routine, meetings throughout the course of this project. Many of our staff are Port St. Lucie/ St. Lucie County residents. The staff at CAPTEC takes pride in their City and work to make sure the projects are completed in conformance with the Contracts and also provide, long lasting value to the Community.

For the Koa Bay CDD project, Mr. Joseph W. Capra, PE will be the District Engineer and will attend all meetings. The Construction Services will be monitored by Mr. Gary Jones, PE. All Engineering Support Services will be prepared by Mr. Thomas (TJ) Shaw, PE, Mr. James Carnes, PE, Mr. Steven Marquart, PE, and Mrs. Teresa (Teri) Andre, PE, all Sr. Project Managers/ Engineers. Our staff has completed many design projects within St. Lucie County and the City of Fort Pierce and is familiar with their Land Development Regulations, Codes and Ordinances.



301 NW Flagler Avenue, Stuart, FL 334994 \* 772-692-4344

#### 4: WILLINGNESS TO TIME AND BUDGET REQUIREMENTS



**The CAPTEC Team** is highly skilled with many professionals and utilizes various local Sub-Consultant support staff to complete Contract requirements. We have an excellent working relationship among the St. Lucie County's and the City of Fort Pierce's Staff and the benefits to selecting CAPTEC for this contract are numerous. CAPTEC's financial decision making, and judgment is superior because of the vast experience of our Staff, having worked throughout the Treasure Coast, on major infrastructure projects, since the 1980's. The CAPTEC Team has experience of working closely on various Projects in St. Lucie County and the City of Fort Pierce.

The CAPTEC Team approaches a project with the plan to provide the most cost-effective solution to the problem and recommends improvements with cost benefit analysis as a guiding factor. CAPTEC personnel are familiar with required design detailing that facilitates expedient plan production that is accurate and on schedule. CAPTEC staff have worked with the County's staff on numerous projects and are familiar with all the current County requirements. In preparing the CAPTEC fee budget, we will list the tasks and itemize our expected costs. This information is shared with the Client, which will confirm that CAPTEC understands the Scope of Services. In the Development of Final Plan Preparation Budgets, the Client will find that CAPTEC has a significant amount of experience, therefore allowing the Client options on the type of material and/or methods of construction to maximize the Client's return on the project. CAPTEC's rates are comparable to other local Engineering Consulting Firms. Our Team will closely monitor schedules and the proposed improvements throughout the design of the project to make sure we complete work on time. The work of Design and Permitting will be seamless, with all key members of the Team working together, throughout the entire project to be successful. The CAPTEC Team has obtained over 900 SFWMD Environmental Resource Permits (ERP) in their 29-year history.

CAPTEC records all meetings and conducts regular meetings with our Sub-Consultants and our Clients primarily via Conference Calls, Video Conferencing/ Zoom, or Teams. However, on-site is preferred. Upon completion of contract negotiation and award, the CAPTEC Project Team Members will meet with the Client's Staff to review the scope, budget, timeline, milestone dates and associated activities. Following this meeting, an in-house Kick-Off Meeting is scheduled and attended by the Project Manager, Inspectors and Project Coordinator along with any Sub-Consultants. Among other topics, the project budget and schedule are reviewed.

The CAPTEC Team works as an extension of the CDD's project staff to maintain frequent communication and use each opportunity to put value-added features into the project design to incorporate cost savings and time savings. Our weekly staff meetings review projects internally with Engineers to consider alternative options to improve projects. All projects at CAPTEC are monitored through a "Project Status Report" updated weekly by the Project Coordinator and discussed each week at the CAPTEC Production Staff Meetings. These weekly meetings also have a production report which mentions all the project milestones and deadlines. The Project Managers review support staff's weekly time sheets, as well as Sub-Consultant invoices and associated activities to ensure that all team members are on task and within the project timeline and budget. Further reviews are performed monthly during the billing process. The CAPTEC Team is committed and looks forward to working with the CDD on this project.



## 5) CERTIFIED SMALL BUSINESS ENTERPRISE

### SOUTH FLORIDA WATER MANAGEMENT DISTRICT

March 13, 2024

REGISTERED VENDOR NO.: 102666

Mr. Joseph W. Capra, President  
CAPTEC Engineering, Inc.  
301 NW Flagler Avenue  
Stuart, FL 34994

CERTIFICATION EFFECTIVE DATE:  
June 27, 2024

CERTIFICATION EXPIRATION DATE:  
June 27, 2027

Dear Mr. Capra:

Congratulations, the South Florida Water Management District (District) has certified your firm as a Small Business Enterprise (SBE). This certification is valid for three (3) years and may **only** be applied when business is conducted in the following area(s):

**Civil, Roadway, Environmental and Stormwater Engineering Services; Project Management; Construction Engineering Inspection Services; Water Quality Monitoring; Expert Witness Testimony; Land Use and Land Development Amendments**

*Your submittal of bids or proposals to supply other products or services outside of the specialty area(s) noted above will not count toward SBE participation. If you require certification in other specialty areas, please contact the Procurement Bureau, SBE Section, for additional information.*

Renewal is required every three (3) years and should be requested a minimum of 45 days prior to the above expiration date.

If any changes occur within your company during the certification period such as ownership, affiliate company status, address, telephone number, licensing status, gross revenue, or any information that relates to your SBE Certification status, you must notify this office in writing immediately. It is imperative that we maintain current information on your company at all times.

Certification is not a guarantee that your firm will receive work, nor an assurance that your firm will remain in the District's vendor database.

We look forward to a mutually beneficial working relationship.

Sincerely,

A handwritten signature in blue ink that reads "Jennifer Dollar".

Jennifer Dollar  
SBE Program Specialist  
Procurement Bureau  
JD



## 6) RECENT, CURRENT & PROJECTED WORKLOAD



**CAPTEC Engineering, Inc.** is conscious of future work projections and prepares them on a regular basis. At CAPTEC we have always hired staff to serve the Client's needs with additional back-up staff to help meet emergency deadlines as they develop. We currently have more than enough staff to complete our current and projected workloads. Our reputation over the past 29 years of business has been to meet or exceed our Clients requirements for on-time and under-budget projects. This requires prioritization and coordination across multiple teams to meet tight deadlines.

CAPTEC's current workload with St. Lucie County is minimal, therefore, we can devote sufficient amount of time and attention to the County's requirements for this Contract.

### St Lucie County Environmental Resources Department Recent Contracts:

**Cypress Creek Rehydration and Natural Storage** – PO received 2/12/2021; Work on-hold since January but to start up again in September.

### St. Lucie County Transit Department Current Contracts:

**Intermodal Transit Facility Phase 3:** PO received 6/17/2024. Currently preparing 100% Construction Plans.

### St. Lucie County Parks and Recreation Department Current Contracts:

**Blind Creek Beach Restroom and Parking Lot Renovations** – PO received 8/31/2021. Project currently under construction.

### St. Lucie County Utilities Department Current Contracts:

**Midway Road 16-inch Force Main** – PO received 10/14/2022. Currently preparing 90% Plans.

**S. Header Canal Rd. to C-24 Canal WM & FM CEI Services** – PO received 4/29/2024. Project under construction.

**SR-70 Utility Improvements from S. Header Canal Rd. to Midway Rd. WM & FM CEI Services** – PO received 4/29/2024. Project under construction.

CAPTEC has Continuing Services and Engineering Contracts with the following Municipalities:

- City of Fort Pierce Engineering Department
- City of Port St. Lucie Engineering/ Public Works/ Parks & Recreation and Utility Systems Depts.
- City of Stuart CRA/ Engineering and Parks & Recreation Departments
- City of West Palm Beach Engineering Dept.
- Florida Department of Transportation (FDOT) District IV
- Indian Trail Improvement District
- Martin County Public Works & Capital Projects Dept.
- Martin County ARPA and CRA Civil Engineering and Project Administration Services
- Martin County Utilities and Solid Waste Dept.
- Town of Jupiter Island
- Town of Sewall's Point
- Village of Indiantown

All Civil Engineering Services provided to these Municipalities are completed on time and within project budget. CAPTEC has adequate staff to complete all project assignments.

## 7) VOLUME OF WORK PREVIOUSLY AWARDED TO CONSULTANT BY DISTRICT



Since the Koa Bay Community Development District is a new CDD and hasn't had a previous District Engineer, CAPTEC Engineering, Inc. welcomes the opportunity to serve as the District's first local Engineering firm. CAPTEC has been serving as the Interim District Engineer for the Koa Bay Community Development District and we have prepared the Engineers report with cost estimates to help establish the CDD.

CAPTEC has provided Civil Engineering Services on the Treasure Coast for the past 29 years. CAPTEC has adequate staff that will attend the District meetings, provide engineering design and permitting services and any other engineering or construction tasks required to complete this project. The Support Services are as follows:

- **District Meetings:** Mr. Joseph W. Capra, PE, President will attend all meetings and will provide Quality Control of the project.
- **Engineering Design and permitting Services:** Design of Roadways/ Stormwater Systems, all Utility Systems and conditions with other Utilities and Regulatory Agencies will be handled by the Project Design Managers/ Engineers and supported by the Design staff, and the Project Coordinators, depending on Scope of Services.
- **Construction Services:** Mr. Gary Jones, PE, Director of Construction Services, provides constructability reviews and monitors all construction services. He is supported by certified construction inspection staff.

# *State of Florida*

## *Department of State*

I certify from the records of this office that CAPTEC ENGINEERING, INC. is a corporation organized under the laws of the State of Florida, filed on November 27, 1996.


The document number of this corporation is P96000097677.

I further certify that said corporation has paid all fees due this office through December 31, 2025, that its most recent annual report/uniform business report was filed on January 6, 2025, and that its status is active.

I further certify that said corporation has not filed Articles of Dissolution.

*Given under my hand and the  
Great Seal of the State of Florida  
at Tallahassee, the Capital, this  
the Sixth day of January, 2025*



  
Secretary of State

Tracking Number: 5385419963CC

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>

THE OFFICIAL SITE OF THE FLORIDA DEPARTMENT OF BUSINESS & PROFESSIONAL REGULATION



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**LICENSEE DETAILS**

10:03:37 AM 5/22/2025

**Licensee Information**

Name:	<b>CAPTEC ENGINEERING, INC. (Primary Name)</b>
Main Address:	<b>301 NW FLAGLER AVE. STUART Florida 34994</b>
County:	<b>MARTIN</b>

**License Information**

License Type:	<b>Engineering Business Registry</b>
Rank:	<b>Registry</b>
License Number:	<b>7657</b>
Status:	<b>Current</b>
Licensure Date:	<b>03/07/1997</b>
Expires:	

**Special Qualifications**                      **Qualification Effective**

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**Alternate Names**

--

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**2601 Blair Stone Road, Tallahassee FL 32399** :: Email: [Customer Contact Center](#) :: Customer Contact Center: 850.487.1395

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Under Florida law, email addresses are public records. If you do not want your email address released in response to a public-records request, do not send electronic mail to this entity. Instead, contact the office by phone or by traditional mail. If you have any questions, please contact 850.487.1395. \*Pursuant to Section 455.275(1), Florida Statutes, effective October 1, 2012, licensees licensed under Chapter 455, F.S. must provide the Department with an email address if they have one. The emails provided may be used for official communication with the licensee. However email addresses are public record. If you do not wish to supply a personal address, please provide the Department with an email address which can be made available to the public. Please see our [Chapter 455](#) page to determine if you are affected by this change.



*Florida Department of Transportation*

RON DESANTIS  
GOVERNOR

605 Suwannee Street  
Tallahassee, FL 32399-0450

JARED W. PERDUE, P.E.  
SECRETARY

July 22, 2025

Joseph Capra, President  
CAPTEC ENGINEERING, INC.  
301 NW Flagler Avenue  
Suite 201  
Stuart, FL 34994  
jcapra@gocaptec.com

Dear Ms. Capra:

The Florida Department of Transportation has reviewed your application for prequalification package and determined that the data submitted is adequate to technically prequalify your firm for the following professional services types of work per Rule 14-75, F.A.C.:

- 3.1 - Minor Highway Design
- 3.2 - Major Highway Design
  
- 6.1 - Traffic Engineering Studies
  
- 7.1 - Signing, Pavement Marking and Channelization
- 7.3 - Signalization
  
- 10.1 - Roadway Construction Engineering Inspection
  
- 13.6 - Land Planning/Engineering

Your firm is now technically prequalified with the Department for Professional Services in the above referenced work types. The overhead audit has been accepted, and your firm may pursue projects in the referenced work types with fees of any dollar amount. This status shall be valid until June 30, 2026, for contracting purposes.

**Approved Rates**

<b>Home Overhead</b>	<b>Facilities Capital Cost of Money (FCCM)</b>	<b>Premium Overtime</b>	<b>Home Direct Expense</b>	<b>Published Fee Schedule</b>
117.30%	0.108%	Reimbursed	0.00%	No

\*Rent and utilities excluded from field office rate. These costs will be directly reimbursed on contracts that require the consultant to provide field office.

**Per Title 23, U.S. Code 112, there are restrictions on sharing indirect cost rates. Refer to Code for additional information.**

Should you have any questions, please feel free to contact me by email at [FDOT.PSPrequalification@dot.state.fl.us](mailto:FDOT.PSPrequalification@dot.state.fl.us).

Sincerely,



Philip Pitts  
Professional Services Qualification Administrator  
PP/YG



Ron DeSantis, Governor

Melanie S. Griffin, Secretary



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PROFESSIONAL ENGINEERS

**STATE OF FLORIDA**  
**DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION**

**BOARD OF PROFESSIONAL ENGINEERS**

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

**CAPRA, JOSEPH WILLIAM**

% CAPTEC ENGINEERING INC  
301 NW FLAGLER AVE.  
STUART FL 34994

**LICENSE NUMBER: PE37638**

**EXPIRATION DATE: FEBRUARY 28, 2027**

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**SHAW, THOMAS JAMES**

729 SE MICHAEL COURT  
STUART FL 34996

**LICENSE NUMBER: PE93244**

**EXPIRATION DATE: FEBRUARY 28, 2027**

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**CARNES, JAMES LELAND**

3112 SE MALL TERRACE  
PORT ST LUCIE FL 34984

**LICENSE NUMBER: PE82316**

**EXPIRATION DATE: FEBRUARY 28, 2027**

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**ANDRE, TERESA LAUREEN**

370 N.E. TOWN TERRACE  
JENSEN BEACH FL 34957

**LICENSE NUMBER: PE54695**

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**MARQUART, STEVEN PAUL**

301 NW FLAGLER AVENUE  
STUART FL 34994

**LICENSE NUMBER: PE34879**

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**JONES, GARY L.S.**

201 SE MONTEREY AVE.  
STUART FL 34996

**LICENSE NUMBER: PE51985**

**EXPIRATION DATE: FEBRUARY 28, 2027**

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# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
12/19/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> R V Johnson Agency, Inc. 2041 SE Ocean Blvd Stuart, FL 34996	<b>CONTACT NAME:</b> Katherine Nguyen - Ext. 206 <b>PHONE (A/C, No, Ext):</b> (772) 287-3366 <b>FAX (A/C, No):</b> (772) 287-4255 <b>E-MAIL ADDRESS:</b> knguyen@rvjohnson.com	
	INSURER(S) AFFORDING COVERAGE	
	INSURER A : <b>West American</b>	NAIC # <b>44393</b>
	INSURER B :	
	INSURER C :	
	INSURER D :	

**INSURED**

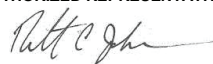
<b>Captec Engineering Inc</b> 301 NW Flagler Avenue Stuart, FL 34994	INSURER E : INSURER F :
--	----------------------------

**COVERAGES**                                  **CERTIFICATE NUMBER:**                                  **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	<b>COMMERCIAL GENERAL LIABILITY</b>			ADP-0000288	12/19/2024	12/19/2025	EACH OCCURRENCE	\$ 2,000,000
	<input checked="" type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	\$
	<input checked="" type="checkbox"/> <b>Professional Liab</b>						MED EXP (Any one person)	\$
	GEN'L AGGREGATE LIMIT APPLIES PER:						PERSONAL & ADV INJURY	\$
	<input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC						GENERAL AGGREGATE	\$ 4,000,000
	OTHER:						PRODUCTS - COMP/OP AGG	\$
							<b>Deductible</b>	\$ 25,000
	<b>AUTOMOBILE LIABILITY</b>						COMBINED SINGLE LIMIT (Ea accident)	\$
	<input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS						BODILY INJURY (Per person)	\$
	<input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						BODILY INJURY (Per accident)	\$
							PROPERTY DAMAGE (Per accident)	\$
								\$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR						EACH OCCURRENCE	\$
	<b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE						AGGREGATE	\$
	DED    RETENTION \$							\$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b>						PER STATUTE    OTH-ER	
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y / N    N / A						E.L. EACH ACCIDENT	\$
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE	\$
							E.L. DISEASE - POLICY LIMIT	\$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

<b>CERTIFICATE HOLDER</b>  Evidence of Coverage	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	<b>AUTHORIZED REPRESENTATIVE</b> 



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

8/4/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Marsh & McLennan (CLW) 101 N Starcrest Dr Clearwater FL 33765	<b>CONTACT NAME:</b> PHONE (A/C, No, Ext): 727-447-6481      FAX (A/C, No): 727-449-1267	
	E-MAIL ADDRESS: CLCerts@MarshMMA.com	
<b>INSURED</b> CAPTEENGIN1 Captec Engineering, Inc. 301 NW Flagler Ave Ste 101 Stuart FL 34994	<b>INSURER(S) AFFORDING COVERAGE</b> <b>NAIC #</b>	
	<b>INSURER A :</b> Covington Specialty Insurance Company      13027	
	<b>INSURER B :</b> Evanston Insurance Company      35378	
	<b>INSURER C :</b> Certain Underwriters at Lloyds      55555	
	<b>INSURER D :</b>	
	<b>INSURER E :</b>	
<b>INSURER F :</b>		

**COVERAGES**

CERTIFICATE NUMBER: 99256893

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	Y	Y	VBB167786	5/5/2025	5/5/2026	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
C	<input type="checkbox"/> <b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY	Y		RTSHNOA02444	6/26/2025	6/26/2026	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ Deductible \$ 1,000
B	<input checked="" type="checkbox"/> <b>UMBRELLA LIAB</b> <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED    RETENTION \$			MKLV7EUL105471	5/9/2025	5/5/2026	EACH OCCURRENCE \$ 1,000,000 AGGREGATE \$ 1,000,000 \$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A				<input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  
 Certificate Holder is Additional Insured as respects to General Liability only if required by written contract, and subject to the terms, conditions and limits as specified in the policy.  
 Waiver of subrogation applies in favor of certificate holder as respects to General Liability only if required by written contract, and subject to the terms, conditions and limits as specified in the policy.  
 30 day Notice of Cancellation with respect to General Liability applies per form.

**CERTIFICATE HOLDER****CANCELLATION**

Evidence of Coverage

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
02/14/2025

**THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.**

**IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).**


<b>PRODUCER</b> Lockton Companies for CoAdvantage 444 West 47th Street #900 Kansas City, MO 64112	<b>CONTACT NAME:</b> PHONE (A/C, No, Ext): (866) 854-5423 FAX (A/C, No): E-MAIL ADDRESS: coi@coadvantage.com													
	<table border="1"> <tr> <th>INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> <tr> <td>INSURER A : American Zurich Insurance Company</td> <td>40142</td> </tr> <tr> <td>INSURER B :</td> <td></td> </tr> <tr> <td>INSURER C :</td> <td></td> </tr> <tr> <td>INSURER D :</td> <td></td> </tr> <tr> <td>INSURER E :</td> <td></td> </tr> <tr> <td>INSURER F :</td> <td></td> </tr> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A : American Zurich Insurance Company	40142	INSURER B :		INSURER C :		INSURER D :		INSURER E :		INSURER F :
INSURER(S) AFFORDING COVERAGE	NAIC #													
INSURER A : American Zurich Insurance Company	40142													
INSURER B :														
INSURER C :														
INSURER D :														
INSURER E :														
INSURER F :														
<b>INSURED</b> CoAdvantage Corporation Alt. Emp: Captec Engineering, INC. 101 Riverfront Blvd Suite 300 Bradenton, FL 34205														

**COVERAGES**                      **CERTIFICATE NUMBER: 25FL0901136851**                      **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD   WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:					EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY					COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED    RETENTION \$					EACH OCCURRENCE \$ AGGREGATE \$ \$
<b>A</b>	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	<input type="checkbox"/> Y / <input type="checkbox"/> N	N/A	WC 56-11-942-11	04/01/2025    04/01/2026	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 2,000,000 E.L. DISEASE - EA EMPLOYEE \$ 2,000,000 E.L. DISEASE - POLICY LIMIT \$ 2,000,000
			<b>Location Coverage Period:</b>	04/01/2025	04/01/2026	<b>Client# 611915-FL</b>

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)**  
Coverage is provided for only those co-employees of, but not subcontractors to:  
Captec Engineering, INC.  
301 NW Flagler Ave Ste 201  
Stuart, FL 34994

<b>CERTIFICATE HOLDER</b>  Captec Engineering, INC. 301 NW Flagler Ave Ste 201 Stuart, FL 34994	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE  

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**KOA BAY**  
**COMMUNITY DEVELOPMENT DISTRICT**

**7D**



**Koa Bay Community Development District  
Request for Qualifications – District Engineering Services**

**Competitive Selection Criteria**

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

Board Member's Signature \_\_\_\_\_

Date \_\_\_\_\_

**KOA BAY**  
**COMMUNITY DEVELOPMENT DISTRICT**

**8**

**RESOLUTION 2025-09**

**A RESOLUTION BY THE BOARD OF SUPERVISORS OF THE KOA BAY COMMUNITY DEVELOPMENT DISTRICT DESIGNATING THE LOCATION OF THE LOCAL DISTRICT RECORDS OFFICE AND PROVIDING AN EFFECTIVE DATE.**

**WHEREAS**, the Koa Bay Community Development District (“District”) is a local unit of special-purpose government created and existing pursuant to Chapter 190, *Florida Statutes*, being situated within the City of Ft. Pierce, Florida; and

**WHEREAS**, the District is statutorily required to designate a local district records office location for the purposes of affording citizens the ability to access the District’s records, promoting the disclosure of matters undertaken by the District, and ensuring that the public is informed of the activities of the District in accordance with Chapter 119 and Section 190.006(7), *Florida Statutes*.

**NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE KOA BAY COMMUNITY DEVELOPMENT DISTRICT:**

**SECTION 1.** The District’s local records office shall be located as follows:

**LOCATION:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**SECTION 2.** This Resolution shall take effect immediately upon adoption.

**PASSED AND ADOPTED** this \_\_\_\_ day of \_\_\_\_\_, 2025.

ATTEST:

**KOA BAY COMMUNITY DEVELOPMENT DISTRICT**

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

\_\_\_\_\_  
Chair/Vice Chair, Board of Supervisors

**KOA BAY**  
**COMMUNITY DEVELOPMENT DISTRICT**

**UNAUDITED**  
**FINANCIAL**  
**STATEMENTS**

**KOA BAY  
COMMUNITY DEVELOPMENT DISTRICT  
FINANCIAL STATEMENTS  
UNAUDITED  
AUGUST 31, 2025**

**KOA BAY  
COMMUNITY DEVELOPMENT DISTRICT  
BALANCE SHEET  
GOVERNMENTAL FUNDS  
AUGUST 31, 2025**

	General Fund	Debt Service Fund	Total Governmental Funds
<b>ASSETS</b>			
Cash	\$ 9,321	\$ -	\$ 9,321
Undeposited funds	13,500	-	13,500
Due from Landowner	14,734	17,060	31,794
Total assets	<u>37,555</u>	<u>17,060</u>	<u>54,615</u>
<b>LIABILITIES AND FUND BALANCES</b>			
Liabilities:			
Accounts payable	\$ 11,823	\$ 17,060	\$ 28,883
Due to Landowner	13,500	17,060	30,560
Accrued wages payable	800	-	800
Accrued taxes payable	489	-	489
Landowner advance	6,000	-	6,000
Landowner adv. - legal advertising	7,196	-	7,196
Total liabilities	<u>39,808</u>	<u>34,120</u>	<u>73,928</u>
<b>DEFERRED INFLOWS OF RESOURCES</b>			
Deferred receipts	14,734	-	14,734
Total deferred inflows of resources	<u>14,734</u>	<u>-</u>	<u>14,734</u>
Fund balances:			
Restricted for:			
Debt service	-	(17,060)	(17,060)
Unassigned	(16,987)	-	(16,987)
Total fund balances	<u>(16,987)</u>	<u>(17,060)</u>	<u>(34,047)</u>
Total liabilities, deferred inflows of resources and fund balances	<u>\$ 37,555</u>	<u>\$ 17,060</u>	<u>\$ 54,615</u>

**KOA BAY  
COMMUNITY DEVELOPMENT DISTRICT  
GENERAL FUND  
STATEMENT OF REVENUES, EXPENDITURES,  
AND CHANGES IN FUND BALANCES  
FOR THE PERIOD ENDED AUGUST 31, 2025**

	Current Month	Year to Date	Budget	% of Budget
<b>REVENUES</b>				
Landowner contribution	\$ -	\$ 24,111	\$ 77,649	31%
Total revenues	<u>-</u>	<u>24,111</u>	<u>77,649</u>	31%
<b>EXPENDITURES</b>				
<b>Professional &amp; administrative</b>				
Supervisor	1,341	4,932	-	N/A
Management/accounting/recording**	2,000	22,000	38,000	58%
Legal	-	3,873	25,000	15%
Engineering	-	-	2,000	0%
Dissemination agent*	-	-	1,167	0%
Telephone	17	183	200	92%
Postage	20	267	500	53%
Printing & binding	42	458	500	92%
Legal advertising	-	7,827	7,500	104%
Annual special district fee	-	-	175	0%
Insurance	-	-	5,500	0%
Meeting room rental	80	411	-	N/A
Contingencies/bank charges	102	1,147	750	153%
Website hosting & maintenance	-	-	1,680	0%
Website ADA compliance	-	-	210	0%
Total expenditures	<u>3,602</u>	<u>41,098</u>	<u>83,182</u>	49%
Excess/(deficiency) of revenues over/(under) expenditures	(3,602)	(16,987)	(5,533)	
Fund balances - beginning	(13,385)	-	-	
Fund balances - ending	<u>\$ (16,987)</u>	<u>\$ (16,987)</u>	<u>\$ (5,533)</u>	

\*These items will be realized when bonds are issued.

\*\*WHA will charge a reduced management fee of \$2,000 per month until bonds are issued.

**KOA BAY  
COMMUNITY DEVELOPMENT DISTRICT  
STATEMENT OF REVENUES, EXPENDITURES  
AND CHANGES IN FUND BALANCES  
DEBT SERVICE FUND  
FOR THE PERIOD ENDED AUGUST 31, 2025**

	Current Month	Year to Date
<b>REVENUES</b>	\$ -	\$ -
Total revenues	-	-
 <b>EXPENDITURES</b>		
Cost of issuance	-	17,060
Total expenditures	-	17,060
Excess/(deficiency) of revenues over/(under) expenditures	-	(17,060)
Fund balance - beginning	(17,060)	-
Fund balance - ending	\$ (17,060)	\$ (17,060)



**KOA BAY**  
**COMMUNITY DEVELOPMENT DISTRICT**

**MINUTES**

**DRAFT**

**MINUTES OF MEETING  
KOA BAY COMMUNITY DEVELOPMENT DISTRICT**

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The Board of Supervisors of the Koa Bay Community Development District held a Public Hearing and Regular Meeting on August 11, 2025 at 10:00 a.m., at the Susan Broom Kilmer Branch Library, 101 Melody Lane, Fort Pierce, Florida 34950.

**Present:**

Kathy Houser	Chair
Jacob Webb	Vice Chair
Joseph “Joby” Slay	Assistant Secretary
Roland LaBonte	Assistant Secretary
Ryan Perna (via telephone)	Assistant Secretary

**Also present:**

Cindy Cerbone	District Manager
Chris Conti (via telephone)	Wrathell, Hunt and Associates, LLC (WHA)
Jonathan Johnson (via telephone)	District Counsel
Joe Capra (via telephone)	District Engineer
Steve Marquardt (via telephone)	Captec Engineering, Inc.
Chad LaBonte (via telephone)	Developer

**FIRST ORDER OF BUSINESS**

**Call to Order/Roll Call**

Ms. Cerbone called the meeting to order at 10:02 a.m.

Supervisors Houser, Webb, Slay and LaBonte were present. Supervisor Perna attended via telephone.

Ms. Cerbone recalled the Goals & Objectives Performance Measures and Standards Reporting requirements and noted that one of the items is for the District Engineer to conduct a physical inspection of CDD infrastructure and produce a report. As there is no infrastructure yet, District Counsel agreed with her that it is sufficient for the District Engineer to provide a letter or documents stating that there is no infrastructure so the visual inspection and a corresponding report were not done. She can provide a sample to the District Engineer.

38 **SECOND ORDER OF BUSINESS**

39 **Consideration of Resolution 2025-37,**  
40 **Ratifying the Action of the District**  
41 **Manager in Re-Setting the Date of the**  
42 **Public Hearing on the Proposed Budget for**  
43 **Fiscal Year 2024/2025; Amending**  
44 **Resolution 2025-35 to Reset the Hearing**  
45 **Thereon; Providing a Severability Clause;**  
46 **and Providing an Effective Date**

47 Ms. Carbone presented Resolution 2025-37. It is necessary to reset the Public Hearing  
48 for the Fiscal Year 2025 budget because the newspaper did not advertise it.

49 **On MOTION by Mr. Slay and seconded by Ms. Houser, with all in favor,**  
50 **Resolution 2025-37, Ratifying the Action of the District Manager in Re-Setting**  
51 **the Date of the Public Hearing on the Proposed Budget for Fiscal Year**  
52 **2024/2025 to September 29, 2025 at 10:00 a.m., at the Susan Broom Kilmer**  
53 **Branch Library, 101 Melody Lane, Fort Pierce, Florida 34950; Amending**  
54 **Resolution 2025-35 to Reset the Hearing Thereon; Providing a Severability**  
55 **Clause; and Providing an Effective Date, was adopted.**

56  
57  
58 **THIRD ORDER OF BUSINESS**

**Public Hearing on Adoption of Fiscal Year**  
**2025/2026 Budget**

- 59  
60  
61 **A. Affidavit of Publication**  
62 **B. Consideration of Resolution 2025-38, Relating to the Annual Appropriations and**  
63 **Adopting the Budget(s) for the Fiscal Year Beginning October 1, 2025, and Ending**  
64 **September 30, 2026; Authorizing Budget Amendments; and Providing an Effective**  
65 **Date**

66 Ms. Carbone presented Resolution 2025-38. She reviewed the proposed Fiscal Year  
67 2026 budget, highlighting increases, decreases and adjustments, compared to the Fiscal Year  
68 2025 budget, and explained the reasons for any changes. This is a Landowner-contribution  
69 budget, with expenses funded as they are incurred. As a bond issuance in Fiscal Year 2026 is  
70 anticipated, this budget reflects the amounts that would be in place once bond issuance occurs.

71 **On MOTION by Mr. Webb and seconded by Mr. LaBonte, with all in favor, the**  
72 **Public Hearing was opened.**

73  
74

75 No affected property owners or members of the public spoke.

76 **On MOTION by Ms. Houser and seconded by Mr. Slay, with all in favor, the**  
77 **Public Hearing was closed.**

78  
79 **On MOTION by Ms. Houser and seconded by Mr. Webb, with all in favor,**  
80 **Resolution 2025-38, Relating to the Annual Appropriations and Adopting the**  
81 **Budget(s) for the Fiscal Year Beginning October 1, 2025, and Ending September**  
82 **30, 2026; Authorizing Budget Amendments; and Providing an Effective Date,**  
83 **was adopted.**

84  
85  
86 **FOURTH ORDER OF BUSINESS** **Consideration of Fiscal Year 2026 Budget**  
87 **Funding Agreement**  
88

89 Ms. Carbone presented the Fiscal Year 2026 Budget Funding Agreement. This is the  
90 same as the Fiscal Year 2026; just the dates and budget exhibit are changed.

91 **On MOTION by Mr. Webb and seconded by Ms. Houser, with all in favor, Fiscal**  
92 **Year 2026 Budget Funding Agreement, was approved.**

93  
94  
95 **FIFTH ORDER OF BUSINESS** **Consideration of Resolution 2025-39,**  
96 **Designating Dates, Times and Locations for**  
97 **Regular Meetings of the Board of**  
98 **Supervisors of the District for Fiscal Year**  
99 **2025/2026 and Providing for an Effective**  
100 **Date**

101  
102 Ms. Carbone presented Resolution 2025-39. She recommended adopting a full Fiscal  
103 Year 2026 Meeting Schedule and then canceling meetings if it is not necessary to meet. The  
104 following will be inserted into the Fiscal Year 2026 Meeting Schedule:

105 DATES: October 13, 2025; November 10, 2025; December 8, 2025; January 12, 2026;  
106 February 9, 2026; March 9, 2026; April 13, 2026; May 11, 2026; June 8, 2026; July 13, 2026;  
107 August 10, 2025 and September 14, 2026

108 TIME: 10:00 AM

109 **On MOTION by Mr. Webb and seconded by Ms. Houser, with all in favor,**  
110 **Resolution 2025-39, Designating Dates, Times and Locations for Regular**  
111 **Meetings of the Board of Supervisors of the District for Fiscal Year 2025/2026,**  
112 **as amended, and Providing for an Effective Date, was adopted.**

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**SIXTH ORDER OF BUSINESS**

**Consideration of Resolution 2025-09, Designating the Location of the Local District Records Office and Providing an Effective Date**

This item was deferred.

122  
123  
124  
125  
126

**SEVENTH ORDER OF BUSINESS**

**Consideration of Goals and Objectives Reporting FY2026 [HB7013 - Special Districts Performance Measures and Standards Reporting]**

127  
128  
129

Ms. Cerbone presented the Goals and Objectives Reporting Fiscal Year 2026 Performance Measures and Standards. She noted that it will be necessary to authorize the Chair to approve the findings related to the 2025 Goals and Objectives.

130  
131

- Authorization of Chair to Approve Findings Related to 2025 Goals and Objectives Reporting**

**On MOTION by Ms. Houser and seconded by Mr. Slay, with all in favor, the Goals and Objectives Reporting Fiscal Year 2026 Performance Measures and Standards and authorizing the Chair to approve the findings related to the 2025 Goals and Objectives Reporting, were approved.**

136  
137

**EIGHTH ORDER OF BUSINESS**

**Acceptance of Unaudited Financial Statements as of June 30, 2025**

140  
141

Ms. Cerbone presented the Unaudited Financial Statements as of June 30, 2025.

**On MOTION by Mr. Webb and seconded by Mr. Slay, with all in favor, the Unaudited Financial Statements as of June 30, 2025, were accepted.**

144  
145

**NINTH ORDER OF BUSINESS**

**Approval of April 14, 2025 Special Meeting Minutes**

148  
149

**On MOTION by Ms. Houser and seconded by Mr. LaBonte, with all in favor, the April 14, 2025 Special Meeting Minutes, as presented, were approved.**

150  
151

152

153 Ms. Cerbone discussed filing Form 1, the requirement to complete four hours of ethics  
154 training and links to online training options.

155

156 **TENTH ORDER OF BUSINESS**

**Staff Reports**

157

158 **A. District Counsel: Kutak Rock LLP**

159 **B. District Engineer (Interim): Captec Engineering, Inc**

160 There were no District Counsel or District Engineer reports.

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

162 • **NEXT MEETING DATE: TBD**

163 ○ **QUORUM CHECK**

164 The next meeting will be held on September 29, 2025 at 10:00 a.m.

165 Ms. Cerbone discussed the potential to be fined for failure to File Form 1.

166 **ELEVENTH ORDER OF BUSINESS**

**Board Members' Comments/Requests**

167

168 There were no Board Members' comments or requests.

169

170 **TWELFTH ORDER OF BUSINESS**

**Public Comments**

171

172 No members of the public spoke.

173

174 **THIRTEENTH ORDER OF BUSINESS**

**Adjournment**

175

176 **On MOTION by Mr. Webb and seconded by Mr. LaBonte, with all in favor, the**  
177 **meeting adjourned at 10:29 a.m.**

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[SIGNATURES APPEAR ON THE FOLLOWING PAGE]

182

183

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Secretary/Assistant Secretary

---

Chair/Vice Chair

**KOA BAY**  
**COMMUNITY DEVELOPMENT DISTRICT**

**STAFF**  
**REPORTS**



**KOA BAY COMMUNITY DEVELOPMENT DISTRICT**

**BOARD OF SUPERVISORS FISCAL YEAR 2025/2026 MEETING SCHEDULE**

**LOCATION**

*Fairfield Inn & Suites Ft. Pierce, 6502 Metal Dr, Ft. Pierce, Florida 34945*

<b>DATE</b>	<b>POTENTIAL DISCUSSION/FOCUS</b>	<b>TIME</b>
<b>October 13, 2025</b>	<b>Regular Meeting</b>	<b>10:00 AM</b>
<b>November 10, 2025</b>	<b>Regular Meeting</b>	<b>10:00 AM</b>
<b>December 8, 2025</b>	<b>Regular Meeting</b>	<b>10:00 AM</b>
<b>January 12, 2026</b>	<b>Regular Meeting</b>	<b>10:00 AM</b>
<b>February 9, 2026</b>	<b>Regular Meeting</b>	<b>10:00 AM</b>
<b>March 9, 2026</b>	<b>Regular Meeting</b>	<b>10:00 AM</b>
<b>April 13, 2026</b>	<b>Regular Meeting</b>	<b>10:00 AM</b>
<b>May 11, 2026</b>	<b>Regular Meeting</b>	<b>10:00 AM</b>
<b>June 8, 2026</b>	<b>Regular Meeting</b>	<b>10:00 AM</b>
<b>July 13, 2026</b>	<b>Regular Meeting</b>	<b>10:00 AM</b>
<b>August 10, 2026</b>	<b>Regular Meeting</b>	<b>10:00 AM</b>
<b>September 14, 2026</b>	<b>Regular Meeting</b>	<b>10:00 AM</b>