

*Lakeside Plantation
Community Development District*

Agenda

October 20, 2021

AGENDA

Lakeside Plantation

Community Development District

219 East Livingston Street, Orlando, FL 32801

Phone: 407-841-5524 – Fax: 407-839-1526

October 13, 2021

Board of Supervisors
Lakeside Plantation
Community Development District

Dear Board Members:

The regular meeting of the Board of Supervisors of the Lakeside Plantation Community Development District will be held **Wednesday, October 20, 2021 at 6:00 p.m. at the Lakeside Plantation Clubhouse, 2800 Plantation Blvd., North Port, Florida.** Following is the advance agenda for the meeting:

- I. Roll Call
- II. Pledge of Allegiance
- III. Audience Comments on Specific Items on the Agenda (*Speakers will fill out a card and submit it to the District Manager prior to beginning of the meeting*)
- IV. District Engineer's Report
- V. Unfinished Business
- VI. New Business Items
 - A. Consideration of Proposals for New A/C Unit
 - i. Innotech
 - ii. Air360
 - B. Consideration of Proposals for Amenity Facility Management
 - C. Consideration of Proposal for Gazebo Repair with Innotech
 - D. Consideration of Agreement with Berger, Toombs, Elam, Gaines & Frank to Provide Auditing Services for Fiscal Year 2021
 - E. Consideration of Letter Regarding District Counsel
- VII. Business Administration
 - A. Approval of Minutes of September 15, 2021 Meeting
 - B. Approval of Check Register
 - C. Balance Sheet and Income Statement
- VIII. General Audience Comments
- IX. Staff Reports
 - A. District Counsel
 - B. District Manager
 - i. Action Items List
 - C. Amenities Manager – Monthly Report
 - D. Landscape Maintenance Update
- X. Other Business
- XI. Supervisors' Requests
- XII. Adjournment

The second order of business is the Audience Comments on Specific Items on the Agenda. Speakers must fill out a Request to Speak form and submit it to the District Manager prior to the beginning of the meeting.

The fourth order of business is the District Engineer's Report. There is no back-up material.

The fifth order of business is Unfinished Business. Any unfinished business will be discussed under this item.

The sixth order of business is new business items. Section A is consideration of proposals for new A/C unit. Section 1 is from Innotech. Section 2 is from Air360. Copies of the proposals are enclosed for your review. Section B is consideration of proposals for amenity facility management. A copy of the proposal is enclosed for your review. Section C is consideration of proposal for gazebo repair with Innotech. A copy of the proposal is enclosed for your review. Section D is consideration of agreement with Berger, Toombs, Elam, Gaines & Frank to provide auditing services for Fiscal Year 2021. A copy of the agreement is enclosed for your review. Section E is consideration of letter regarding District Counsel. A copy of the letter is enclosed for your review.

The seventh order of business is business administration. Section A is approval of minutes of the September 15, 2021 meeting. The minutes are enclosed for your review. Section B is approval of check register. Section C is approval of the balance sheet and income statement.

The ninth order of business is Staff Reports. Section B is the District Manager's report. Section 1 is the Action Items list for your review. Section C is the Amenities Manager Report. Section D is landscape maintenance update.

Staff will provide any additional reports at the meeting. Additional support material may be provided under separate cover or distributed at the meeting, and the balance of the agenda will be discussed at the meeting. In the meantime, if you have any questions, please contact me.

Sincerely,

Tricia Adams
District Manager

Cc: Michael Eckert, District Counsel; Sarah Sandy, District Counsel; Andy Tilton, District Engineer;
Brent Burford, District Engineer
Enclosures

SECTION VI

SECTION A

SECTION 1

Innotech Construction Services, LLC
1077 Innovation Ave, Unit 112
North Port, FL 34289
+1 9412040159
chris.owens73@gmail.com

Estimate

ADDRESS

Lakeside Plantation
2800 Plantation Blvd
North Port, FL 33948

ESTIMATE # 1017

DATE 10/13/2021

EXPIRATION DATE 11/15/2021

PAYMENT TERMS

50/50

DATE	ACTIVITY	DESCRIPTION	QTY	RATE	AMOUNT
	Sales	Community Center - 15 Ton A/C Replacement	1	26,500.00	26,500.00
	Job Deposit	50% of the Total Cost will be due upon entering the contract before work commences. At job completion, a final invoice will be sent for the remaining 50% Total Due.	0	13,250.00	0.00
	Inclusions	Price includes demolition, clean-up, removal, and disposal, as well as all associated parts, labor, and installation unless otherwise noted.	1	0.00	0.00
	Inclusions	Price includes all applicable permitting and application fees. Price Includes a 2 Year Quarterly Service Contract: Quarterly full service; Every 3 months. Includes mechanical tune-up, inspection, and cleaning of the drains and coils, as well as filter and belt changes. The first visit will be scheduled 3 months after the installation date, continuing on a 3-month schedule from that date forward until the 2yr anniversary date of the installation. At that time a final service will be provided, fulfilling the contract. **We reserve the right to shift the calendar date that service is provided to accommodate holidays and weekends. Regardless of how the actual service date falls, the contract will not expire until you have received your 8th and final service.	1	0.00	0.00

DATE	ACTIVITY	DESCRIPTION	QTY	RATE	AMOUNT
	Inclusions	Warranties Included: 1 Year Warranty on Parts 1 Year Warranty on Labor 5 Year Warranty on the Compressor	1	0.00	0.00
	HVAC Repair and/or Replacement	Disconnect wiring and duct work from existing A/C handling unit; remove and dispose. Replace with a new comparably featured Carrier unit.	1	0.00	0.00
	HVAC Repair and/or Replacement	Disconnect wiring and duct work from existing A/C condensing unit; remove and dispose. Replace with a new comparably featured Carrier unit.	1	0.00	0.00
	HVAC Repair and/or Replacement	Disconnect wiring from thermostat; remove and dispose. Replace with a new comparably featured unit and reconnect.	1	0.00	0.00
	Parts, Labor, and Installation	Flush all of the HVAC line sets	1	0.00	0.00
	Parts, Labor, and Installation	Reconnect the pre-existing duct work and wiring to the newly installed A/C handling and condensing units.	1	0.00	0.00
	Parts, Labor, and Installation	Start, program, and run new unit after completed installation; test and charge for proper operations.	1	0.00	0.00

TOTAL

\$26,500.00

Accepted By

Accepted Date

Innotech Construction Services, LLC
1077 Innovation Ave, Unit 112
North Port, FL 34289
+1 9412040159
chris.owens73@gmail.com

Estimate

ADDRESS

Lakeside Plantation
2800 Plantation Blvd
North Port, FL 33948

ESTIMATE # 1265

DATE 10/06/2021

DATE	ACTIVITY	DESCRIPTION	QTY	RATE	AMOUNT
	A/C Service and Maintenance	Quarterly full service; Every 3 months. Includes mechanical tune-up, inspection, and cleaning of the drains and coils, as well as filter and belt changes. The contract would be an annual contract for \$2000 which includes Full-Service and Inspections very 3 months.	4	500.00	2,000.00

TOTAL

\$2,000.00

Accepted By

Accepted Date

SECTION 2



09/24/2021

UNIT PROPOSAL

NAME: LAKESIDE PLANTATION COMMUNITY
ADDRESS: DEVELOPMENT DISTRICT
 2200 Plantation Blvd, North Port, FL 34289
PHONE: (941) 423-5500
 TAMARA LORF
CELL:
E-MAIL:

3821B Tamiami Trail #112 Port Charlotte, FL 33952
 FL LIC# CAC1817824 941-916-0440



Lump sum price of \$26,462.00 dollars per your Tax Exempt Certificate 85-8012611342c-1 exp. 6-30-2024

All material is guaranteed to be a specified. All work to be completed in a workmanlike manner according to standard practices.

Any alteration or deviation from specifications below involving extra costs will be executed only upon written orders, and will become an extra charge over and above this proposal.

All agreements contingent upon strikes, delivery schedules accidents or delays beyond our control.

Owner to carry fire, tornado and other necessary insurance.

Our workers are full covered by Workman's Compensation & Liability Insurance.

CURRENT EQUIPMENT LEAD TIME IS 30 DAYS. INSTALLATION 5 DAYS

Install 15 Ton RHEEM 3-phase air conditioning system ; Indoor Air Handler and Outdoor Condensing Unit

Installation includes:

Demolition and removal of existing equipment

Permit and Labor

Secondary Pan

Refrigerant R410A

Safety Switches for Drain

Any Necessary Breakers and or contactors

All Trucking, Rigging and Cranes

Re-using: electrical both high and low voltage, drain line, smoke detector, major ductwork, copper refrigerant lines.

We are not responsible for leaks from the existing line set or for re-installing ceiling grid and tiles.

*Warranty is one year labor, one year parts, 5 years compressor PER RHEEM COMMERCIAL EQUIPMENT

WWW.AIR360HEATINGANDCOOLING.COM PHONE : 941-916-0440 FAX: 941-237-4098 FACEBOOK AIR 360 HEATING AND COOLING

STANDARD LABOR RATE : \$ 75.00 HR PER TECH , SERVICE CALL BASE RATE \$59.95 EACH CALL UNLESS UNDER PLAN. REPAIRS ARE COVERED UNDER OUR 30 DAY WARRANTY UNLESS NEGLIGENCE OR ACT OF GOD IS CAUSE OF RETURN CALL. NEW EQUIPMENT IS COVERED FOR 1 YEAR AFTER INSTALLATION OR MORE IF MANUFACTURER WARRANTS SUCH.

TERMS: 75% DEPOSIT FOR EQUIPMENT 24 HOURS BEFORE INSTALLATION, FULL BALANCE DUE UPON COMPLETION
 If collection is necessary, customer agrees to pay reasonable attorney's fees plus court costs. Signee hereby affirms that they have the authority to order the work that has been completed as outlined above. It is agreed that the seller will retain title to any equipment or material that has been or may be furnished until final payment has been made and if payment is not made it is agreed that the seller shall have the right to remove the equipment or material and AIR 360 Heating and Cooling, LLC will be held harmless for any damages resulting from the removal thereof due to a non-payment related issue.
 Materials or parts warranties are subject to manufacturer's established warranty policies. Improper maintenance, acts of god, rodent infestation, misuse or abuse of the equipment will void all claims of Warranty for work and equipment provided by AIR 360 Heating and Cooling, LLC. No other warranties exist other than the warranties provided by the manufacturer or specific warranties stated above. AIR 360 Heating and Cooling, LLC has the sole determination of any or all warranty claims. By signing both acceptance and installer sign off signee does hereby affirm acceptance with all terms stated and certifies complete satisfaction and total completion of work associated with this installation.

NO HOLDBACKS ON COMPLETION PAYMENTS FOR SPECIAL ORDER ITEMS OR CUSTOM SHEET METAL WORK LIKE SHROUDS, HANGERS, OR SUPPORTS. FULL BALANCE DUE UPON COMPLETION OF WORK, UNIT OPERATION IS CONSIDERED COMPLETE



INVOICE TOTAL \$ 26,462.00

\$
\$
\$
\$

CUSTOMER PROPOSAL ACCEPTANCE SIGNATURE:

DATE :

CUSTOMER INSTALLER INITIALS :

PERMIT NUMBER:

INSTALL DATE:



3821B Tamiami Trail #112 Port Charlotte, FL 33952
FL LIC# CAC1817824 **941-916-0440**

UNIT SPECIFICATIONS

PROPOSAL

09/24/2021

NAME: LAKESIDE PLANTATION COMMUNITY
ADDRESS: DEVELOPMENT DISTRICT
 2200 Plantation Blvd, North Port, FL 34289
PHONE: (941) 423-5500
 TAMARA LORF
CELL:
E-MAIL:



Rheem Commercial Air Handler
 RHGL Series 15 ton
 Cabinet - Powder coat painted. Matching discharge plenums and decorative supply and return air grilles are available for use when units are to be installed within conditioned space.
 Motor- Inherently protected motors are mounted inside of insulated cabinet to reduce motor noise. A choice of motor horsepower and drive combinations are available to allow you to meet specified CFM at various static pressures up to 2" [498 kPa] external static pressure.
 Low Profile - Allows for horizontal installation in most standard drop ceiling applications, and the movement of units through most standard doorways for addition or replacement work.
 Thermal Expansion Valves - Standard all models.
 Filters - One inch [25 mm] throwaway filters are standard, but filter racks are designed to accept two inch [51 mm] filters.
 Evaporator Coil -Two circuit, interlaced row split coils are constructed with copper tubes and aluminum fins mechanically bonded to the tubes for maximum heat transfer capabilities. All coil assemblies are leak tested up to 450 PSIG [3100 kPa] internal pressure prior to installation into units.
 Refrigerant Connections - Field piping connections are made through a fixed post between two side access panels on either side of the unit. Allows flexibility to meet most field conditions as well as full accessibility after the installation is complete.
 Units may be used with two straight cool condensing units or single circuit manifolded in the field using the copper fittings shipped with each unit. The RHGL Air Handler has not been tested, rated or certified to operate with dual remote heat pumps.
 Drain Pan -The galvanized steel drain pan is designed to trap condensate in either vertical or horizontal installations. Condensate drain connections are located on both sides of the unit allowing complete flexibility to meet most field conditions.
 Service Access -Two removable panels on top and each side of the unit are easily removed for access to motors, blowers, sheaves, and filters.
 Horizontal or Vertical - All models are designed for either application and can be installed in either position as supplied from the factory.
 Testing - All units are run tested at the factory prior to shipment.
 Units are shipped with a holding charge of nitrogen.

Rheem Commercial High-Efficiency Condensing Units
 RAWL High-Efficiency Series - 15 Ton
 Unit Features
 CABINET - Galvanized steel with a durable finish. Stamped louvered panels offer 100% protection for the condenser coil.
 COMPRESSOR - The Scroll Compressor is hermetically sealed with internal overload protection and durable insulation on motor windings. The entire compressor is mounted on rubber grommets to reduce vibration and noise.
 CONDENSER COIL - Constructed with copper tubes and aluminum fins mechanically bonded to the tubes for maximum heat transfer capabilities.
 BASE PAN - Galvanized steel.
 REFRIGERANT CONNECTIONS - Field piping connections are made through a fixed panel. This allows removal of access panels after piping connections have been made.
 CRANKCASE HEATERS - Standard, all models. Prevents refrigerant migration to compressor(s).
 LOW AMBIENT CONTROL - A pressure sensitive fan cycling control to allow unit operation down to 0°F [-17.8°C] is standard.
 SERVICE VALVES - Standard on liquid and suction lines. Allows outdoor section to be isolated from indoor coil.
 SERVICE ACCESS - Control box as well as the compressor and other refrigerant controls are accessible through access panels. Control box may be open without affecting the normal operation of the unit. Condenser fan motors are accessible by removing wire grilles.
 FILTER DRIER - Standard (uninstalled) on all models. Helps ensure refrigerant cleanliness.
 TRANSFORMER - Step-down type, line to 24 volts. Provides control circuit voltage.
 CONTACTOR - The contactor is an electrical switch which operates the compressor and condenser fans.
 HIGH PRESSURE CONTROL - Opens the contactor circuit on high refrigerant pressure; manual reset.
 LOW PRESSURE CONTROL - Stops compressor operation in the event of loss of refrigerant.
 CONDENSER FAN MOTOR (Direct Drive) - Ball bearing 1075 RPM motors are mounted to minimize vibration and noise problems. These are permanent split capacitor types. ECM fan motor (10 Ton)
 TESTING - All units are run tested at the factory prior to shipment. Units are shipped with a holding charge of nitrogen.
 EXTERNAL GAUGE PORTS - Allows pressures to be checked without removing access panel.
 COIL LOUVERS - Helps prevent damage to outdoor coils.
 TIME DELAY - Supplied on tandem compressor models to provide a delay between stages.
 EQUIPMENTGROUND - Lug for field connection of ground wire.

WWW.AIR360HEATINGANDCOOLING.COM PHONE : 941-916-0440 FAX: 941-237-4098 FACEBOOK AIR 360 HEATING AND COOLING

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NO HOLDBACKS ON COMPLETION PAYMENTS FOR SPECIAL ORDER ITEMS OR CUSTOM SHEET METAL WORK LIKE SHROUDS, HANGERS, OR SUPPORTS. FULL BALANCE DUE UPON COMPLETION OF WORK, UNIT OPERATION IS CONSIDERED COMPLETE

CUSTOMER PROPOSAL ACCEPTANCE SIGNATURE:

DATE :

CUSTOMER INSTALLER INITIALS :

PERMIT NUMBER:

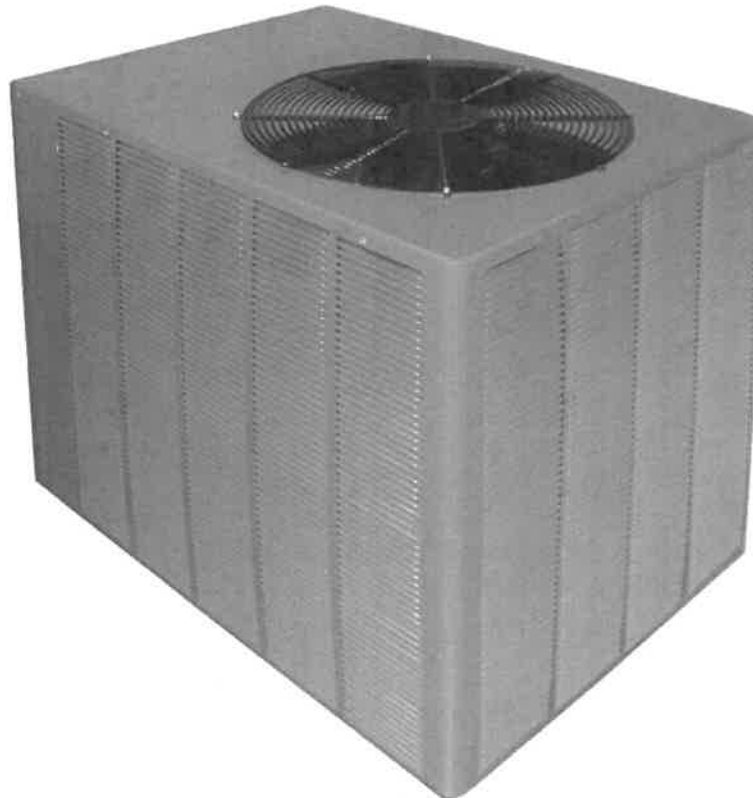
INSTALL DATE:

INSTALLATION INSTRUCTIONS

HIGH-EFFICIENCY CONDENSING UNITS

FEATURING EARTH-FRIENDLY R-410A REFRIGERANT 

RAWL - 6½ & 7½ TON



RECOGNIZE THIS SYMBOL AS AN INDICATION OF IMPORTANT SAFETY INFORMATION!

⚠ WARNING

THESE INSTRUCTIONS ARE INTENDED AS AN AID TO QUALIFIED, LICENSED SERVICE PERSONNEL FOR PROPER INSTALLATION, ADJUSTMENT AND OPERATION OF THIS UNIT. READ THESE INSTRUCTIONS THOROUGHLY BEFORE ATTEMPTING INSTALLATION OR OPERATION. FAILURE TO FOLLOW THESE INSTRUCTIONS MAY RESULT IN IMPROPER INSTALLATION, ADJUSTMENT, SERVICE OR MAINTENANCE POSSIBLY RESULTING IN FIRE, ELECTRICAL SHOCK, PROPERTY DAMAGE, PERSONAL INJURY OR DEATH.



ISO 9001:2000
Certificate Number: 30364

DO NOT DESTROY THIS MANUAL

PLEASE READ CAREFULLY AND KEEP IN A SAFE PLACE FOR FUTURE REFERENCE BY A SERVICEMAN

[] INDICATES METRIC CONVERSIONS

92-42665-09-02
SUPERSEDES 92-42665-09-01

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► Installation Instructions are updated on a regular basis. This is done as product changes occur or if new information becomes available. In this publication, an arrow (►) denotes changes from the previous edition or additional new material.

WARNING

IMPORTANT: ALL MANUFACTURER PRODUCTS MEET CURRENT FEDERAL OSHA GUIDELINES FOR SAFETY. CALIFORNIA PROPOSITION 65 WARNINGS ARE REQUIRED FOR CERTAIN PRODUCTS, WHICH ARE NOT COVERED BY THE OSHA STANDARDS.

CALIFORNIA'S PROPOSITION 65 REQUIRES WARNINGS FOR PRODUCTS SOLD IN CALIFORNIA THAT CONTAIN, OR PRODUCE, ANY OF OVER 600 LISTED CHEMICALS KNOWN TO THE STATE OF CALIFORNIA TO CAUSE CANCER OR BIRTH DEFECTS SUCH AS FIBERGLASS INSULATION, LEAD IN BRASS, AND COMBUSTION PRODUCTS FROM NATURAL GAS.

ALL "NEW EQUIPMENT" SHIPPED FOR SALE IN CALIFORNIA WILL HAVE LABELS STATING THAT THE PRODUCT CONTAINS AND/OR PRODUCES PROPOSITION 65 CHEMICALS. ALTHOUGH WE HAVE NOT CHANGED OUR PROCESSES, HAVING THE SAME LABEL ON ALL OUR PRODUCTS FACILITATES MANUFACTURING AND SHIPPING. WE CANNOT ALWAYS KNOW "WHEN, OR IF" PRODUCTS WILL BE SOLD IN THE CALIFORNIA MARKET.

YOU MAY RECEIVE INQUIRIES FROM CUSTOMERS ABOUT CHEMICALS FOUND IN, OR PRODUCED BY, SOME OF OUR HEATING AND AIR-CONDITIONING EQUIPMENT, OR FOUND IN NATURAL GAS USED WITH SOME OF OUR PRODUCTS. LISTED BELOW ARE THOSE CHEMICALS AND SUBSTANCES COMMONLY ASSOCIATED WITH SIMILAR EQUIPMENT IN OUR INDUSTRY AND OTHER MANUFACTURERS.

- GLASS WOOL (FIBERGLASS) INSULATION
- CARBON MONOXIDE (CO)
- FORMALDEHYDE
- BENZENE

MORE DETAILS ARE AVAILABLE AT THE WEBSITES FOR OSHA (OCCUPATIONAL SAFETY AND HEALTH ADMINISTRATION), AT WWW.OSHA.GOV AND THE STATE OF CALIFORNIA'S OEHHA (OFFICE OF ENVIRONMENTAL HEALTH HAZARD ASSESSMENT), AT WWW.OEHHA.ORG. CONSUMER EDUCATION IS IMPORTANT SINCE THE CHEMICALS AND SUBSTANCES ON THE LIST ARE FOUND IN OUR DAILY LIVES. MOST CONSUMERS ARE AWARE THAT PRODUCTS PRESENT SAFETY AND HEALTH RISKS, WHEN IMPROPERLY USED, HANDLED AND MAINTAINED.

1.0 SAFETY INFORMATION

WARNING

THESE INSTRUCTIONS ARE INTENDED AS AN AID TO QUALIFIED LICENSED SERVICE PERSONNEL FOR PROPER INSTALLATION, ADJUSTMENT AND OPERATION OF THIS UNIT. READ THESE INSTRUCTIONS THOROUGHLY BEFORE ATTEMPTING INSTALLATION OR OPERATION. FAILURE TO FOLLOW THESE INSTRUCTIONS MAY RESULT IN IMPROPER INSTALLATION, ADJUSTMENT, SERVICE OR MAINTENANCE POSSIBLY RESULTING IN FIRE, ELECTRICAL SHOCK, PROPERTY DAMAGE, PERSONAL INJURY OR DEATH.

WARNING

DISCONNECT ALL POWER TO THE UNIT BEFORE STARTING MAINTENANCE. FAILURE TO DO SO CAN RESULT IN SEVERE ELECTRICAL SHOCK OR DEATH.

WARNING

DO NOT USE OXYGEN TO PURGE LINES OR PRESSURE SYSTEM FOR LEAK TEST. OXYGEN REACTS VIOLENTLY WITH OIL, WHICH CAN CAUSE AN EXPLOSION RESULTING IN SEVERE PERSONAL INJURY OR DEATH.

WARNING

AFTER COMPLETION OF WIRING CHECK ALL ELECTRICAL CONNECTIONS, INCLUDING FACTORY WIRING WITHIN THE UNIT, AND MAKE SURE ALL CONNECTIONS ARE TIGHT, REPLACE AND SECURE ALL ELECTRICAL BOX COVERS AND ACCESS DOORS BEFORE LEAVING UNIT OR TURNING ON POWER TO CIRCUIT SUPPLY UNIT. FAILURE TO DO SO CAN CAUSE A FIRE OR ELECTRICAL SHOCK RESULTING IN PROPERTY DAMAGE, PERSONAL INJURY OR DEATH.

WARNING

THIS UNIT MUST BE PERMANENTLY GROUNDED. A GROUND LUG IS PROVIDED NEAR THE CONTACTOR FOR A GROUND WIRE. FAILURE TO DO SO CAN CAUSE A FIRE OR ELECTRICAL SHOCK RESULTING IN PROPERTY DAMAGE, SEVERE PERSONAL INJURY OR DEATH.

CAUTION

R-410A systems operate at higher pressures than R-22 systems. Do not use R-22 service equipment or components on R-410A equipment.

CAUTION

Only use evaporators approved for use on R-410A systems. Use of existing R-22 evaporators can introduce mineral oil to the R-410A refrigerant forming two different liquids and decreasing oil return to the compressor. This can result in compressor failure.

II. INTRODUCTION

This booklet contains the installation and operating instructions for your self-contained air conditioner. There are a few precautions that should be taken to derive maximum satisfaction from it. Improper installation can result in unsatisfactory operation or dangerous conditions.

Read this booklet and any instructions packaged with separate equipment required to make up the system prior to installation. Give this booklet to the owner and explain its provisions. The owner should retain this booklet for future reference.

III. CHECKING PRODUCT RECEIVED

Upon receiving the unit, inspect it for any damage from shipment. Claims for damage, either shipping or concealed, should be filed immediately with the shipping company. Check the unit model number, electrical characteristics, and accessories to determine if they are correct.

IV. EQUIPMENT PROTECTION FROM THE ENVIRONMENT

The metal parts of this unit may be subject to rust or deterioration in adverse environmental conditions. This oxidation could shorten the equipment's useful life. Salt spray, fog or mist in seacoast areas, sulphur or chlorine from lawn watering systems, and various chemical contaminants from industries such as paper mills and petroleum refineries are especially corrosive.

If the unit is to be installed in an area where contaminants are likely to be a problem, special attention should be given to the equipment location and exposure.

1. Avoid having lawn sprinkler heads spray directly on the unit cabinet.
2. In coastal areas, locate the unit on the side of the building away from the waterfront.
3. Shielding provided by a fence or shrubs may give some protection.
4. Elevating the unit off its slab or base enough to allow air circulation will help avoid holding water against the basepan.

Regular maintenance will reduce the buildup of contaminants and help to protect the unit's finish.

WARNING

DISCONNECT ALL POWER TO THE UNIT BEFORE STARTING MAINTENANCE. FAILURE TO DO SO CAN RESULT IN SEVERE ELECTRICAL SHOCK OR DEATH.

1. Frequent washing of the cabinet, fan blade and coil with fresh water will remove most of the salt or other contaminants that build up on the unit.
2. Regular cleaning and waxing of the cabinet with an automobile polish will provide some protection.
3. A liquid cleaner may be used several times a year to remove matter that will not wash off with water.

Several different types of protective coatings are offered in some areas. These coatings may provide some benefit, but the effectiveness of such coating materials cannot be verified by the equipment manufacturer.

The best protection is frequent cleaning, maintenance and minimal exposure to contaminants.

V. WHY USE AN AIR COOLED SPLIT SYSTEM?

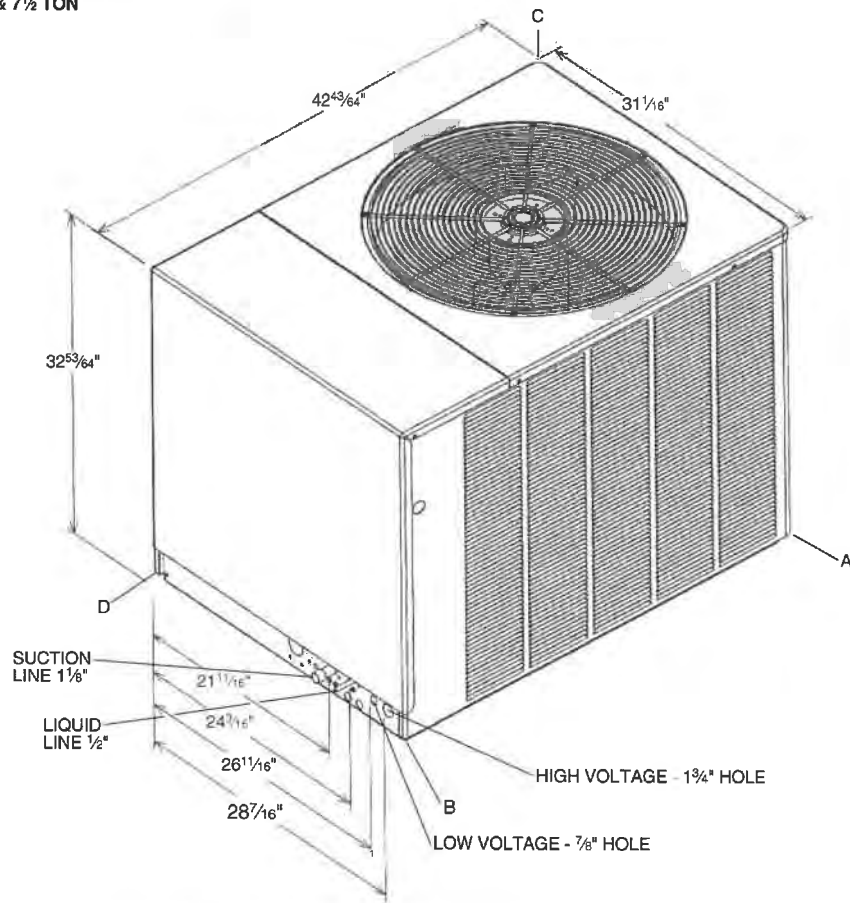
- With an air cooled system, you have no water or sewer connections to make, and no troublesome and costly water treatment problems.
- Since the condensing unit is located outside the building, and the low profile air handling unit can be installed in the drop ceiling or in the conditioned space, you will not need a separate equipment room which takes up valuable building space.
- Because of the simple design of the condensing unit, installation is quick and simple, and very little maintenance is required.
- The size ranges offered allow you to mix or match components to meet actual job requirements, thus eliminating the need to use oversized or undersized equipment. Equipment sized to meet the actual load will provide better operating economy, better humidity control, and longer equipment life.
- Remote mounting of the already quiet condensing unit keeps the compressor and condenser fan noise outside, and the vertical discharge fans carry the sound up and away from the surrounding area.

TABLE 1

CORNER WEIGHTS (Pounds)

Unit Model	Total Weight Lbs. [kg]	Corner Weights, Lbs. [kg]			
		A	B	C	D
RAWL-078	291	50 [22.7]	73 [33.1]	69 [31.3]	99 [44.9]
RAWL-090	318	53 [24]	84 [38.1]	71 [32.2]	110 [49.9]

FIGURE 1
UNIT DIMENSIONS — 6½ & 7½ TON



VI. STANDARD UNIT FEATURES — 6½ AND 7½

CABINET — Galvanized steel with a durable powder coat paint finish. The cabinet front and sides are formed into a one piece unitized design with stamped louvers to provide protection for the condenser coils.

SERVICE ACCESS — Control box with separation between line and control voltages, as well as compressor and other refrigerant controls are accessible through removable top and side panels (without affecting normal operation of unit).

Condenser fan motors are mounted on removable top panels which bring the motors out to you and expose entire condenser coil for cleaning.

COMPRESSOR — Hermetically sealed with internal high temperature protection and durable insulation on motor windings. The compressor is mounted on rubber grommets to reduce vibration and noise.

CONDENSER COILS — Constructed with copper tubes and aluminum fins mechanically bonded to tubes for maximum heat transfer capabilities. All coil assemblies are leak tested.

REFRIGERANT CONNECTIONS — All field sweat joints are made external of the unit and are located close to the ground for a neat looking installation.

LOW AMBIENT CONTROL — A pressure sensitive fan cycling control allows operation of units down to 0°F.

HIGH PRESSURE CONTROL — Manual reset control deactivates system if abnormally high pressure occurs.

LOW PRESSURE CONTROL — Automatic reset control deactivates system if abnormally low pressure or refrigerant loss occurs.

SERVICE VALVES — Standard on liquid line and suction line. Allows outdoor section to be isolated from indoor coil.

FILTER DRIER — Standard, field installed. Helps maintain system cleanliness.

CONDENSER FAN MOTORS — Direct-drive, PSC single-phase motors.

TRANSFORMER — Step down type, from Line to 24 volts. (Refer to Figure 2.)

CONTACTOR — (Refer to Figure 2.) The contactor is an electrical switch which operates the compressor and condenser fans. Its 24 volt coil is activated through the High Pressure Control and Low Pressure Control on a call for cooling.

CAPACITORS — Help provide starting torque necessary to boost the condenser fan motors to operating speed by directing their stored energy to the starter winding in step with the running winding.

EQUIPMENT GROUND — Lug for field connection of ground wire.

TESTING — All units are run tested at the factory prior to shipment.

FIGURE 2
6½ & 7½ TON FEATURES

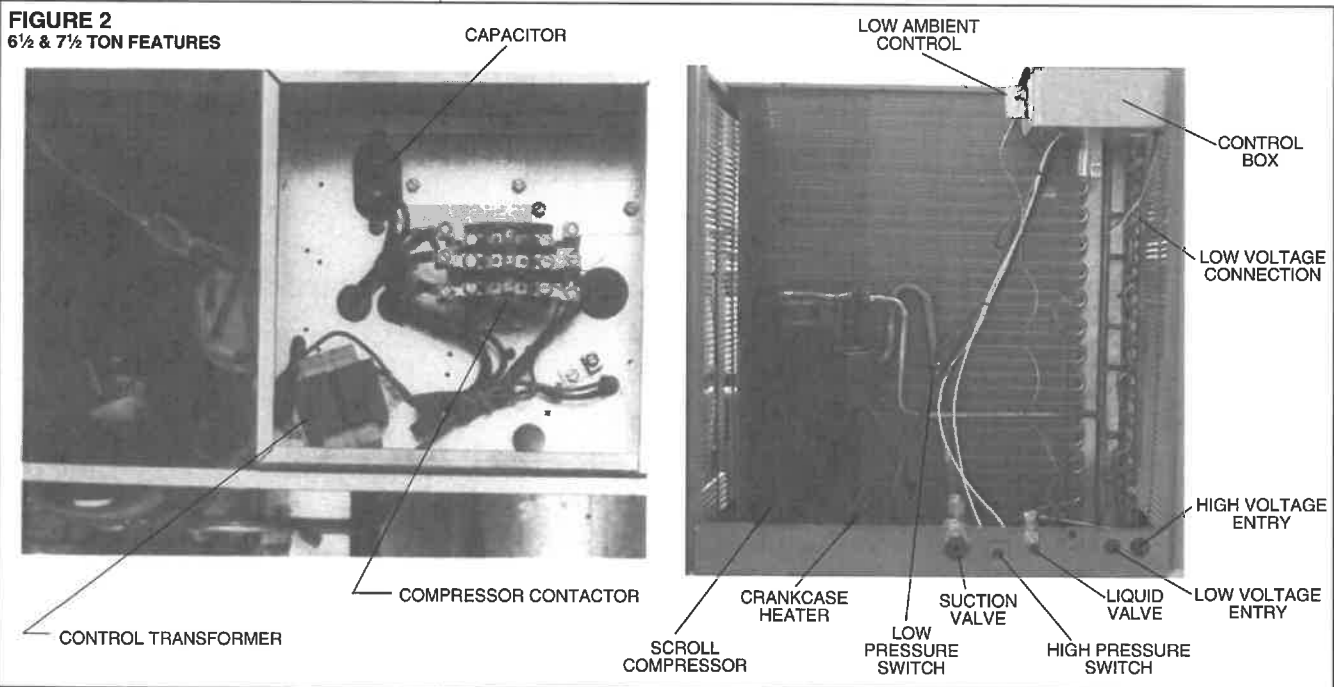


TABLE 2
PHYSICAL AND ELECTRICAL DATA TABLE (RAWL-)

Condensing Unit	078	090
Operating Weight (lbs.) [kg]	291 [132.0]	314 [142.4]
Shipping Weight (lbs.) [kg]	318 [144.2]	341 [154.7]
COMPRESSOR:		
Quantity	1	1
Type	Scroll	
RPM	3500	
CONDENSER FANS:		
Quantity	1	1
CFM [L/s]	4700 [2218]	4700 [2218]
Diameter (in.) [mm]	24 [610]	24 [610]
Motor Horsepower (ea.) [W]	1/3 [249]	1/3 [249]
Type	PSC	PSC
RPM	1075	1075
CONDENSER COIL:		
Quantity	1	1
Rows	1 1/2	2
Fins per Inch	20	22
Square Feet [m2]	22.2 [3]	22.2 [3]
Fins/Tubes	Aluminum/Copper	
Tube Size, O.D. (in.) [mm]	3/8 [10]	3/8 [10]

ELECTRICAL DATA TABLE (RAWL-)						
MODEL NO. RAWL-	078CAZ	078DAZ	078YAZ	090CAZ	090DAZ	090YAZ
COMPRESSOR MOTOR:						
Electrical Characteristics	208/230-3-60	460-3-60	575-3-60	208/230-3-60	460-3-60	575-3-60
OPERATING CURRENT:						
Rated Load Amps	22.4/22.4	10.6	7.0	25/25	12.2	9.0
Locked Rotor Amps	149	75	54	164	100	78
CONDENSER FAN MOTORS:						
Volts & Phase	208/230-1	460-1	575-1	208/230-1	460-1	575-1
Full Load Amps (each)	2.2	1.3	1.0	2.2	1.3	1.0
SYSTEM CHARACTERISTICS:						
Unit FLA	25.0	12	8.0	28.0	14.0	10.0
Minimum Circuit Ampacity	31/31	15	11.0	34/34	17	13
Max. Fuse Size or HACR Circuit Breaker Ampacity	50/50	25	15	50/50	25	20
Disconnect Size	60	30	30	60	30	30

NOTE: N.E.C., C.E.C. and local codes take precedence over suggested wire and fuse sizes.

[] Designates Metric Conversion

VII. INSTALLATION

A. IMPORTANT MESSAGE TO OWNER

The manufacturer assumes no responsibility for equipment installed in violation of any code or regulation. The operation portion of this manual gives instructions as to the service and care of the unit. It is recommended that the installer go over the operational portion of this manual with the owner so that there is a full understanding of the equipment and how it is intended to function.

These instructions should be read and kept for future reference. It is suggested that this booklet be affixed to or adjacent to the indoor equipment. It is addressed to your dealer and serviceman, but we highly recommend that you read it—paying particular attention to the section titled “MAINTENANCE.”

B. INSPECTION AND HANDLING

Inspect exterior of unit for evidence of rough handling in shipment. If damage is found, enter claim at once. Unpack carefully after moving unit to approximate location. Any damage should be reported immediately to the transportation company.

Material in this shipment was inspected at the factory and released to the common carrier with no known damage.

C. ORDER PARTS

When reporting shortages or damaged parts, or when ordering repair parts, give the complete unit model and serial numbers which are stamped on the Unit Rating Plate.

D. STANDARD ITEMS

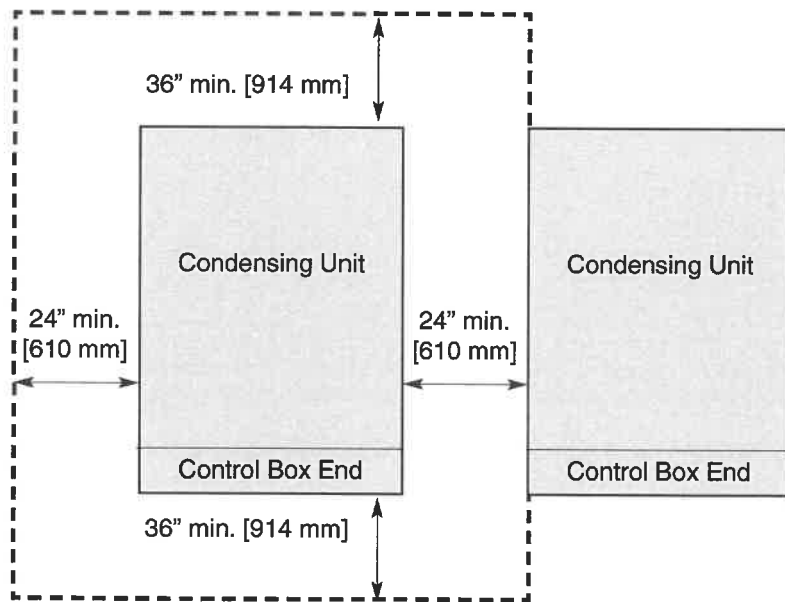
The condensing unit consists of a completely assembled package which includes a compressor, a condenser coil, fan, fan motors, outdoor control box, factory wiring, factory tubing and fittings.

E. INSTALLATION GENERAL

The condensing unit should be installed outdoors. It should be located as near as possible to the evaporator section to keep connecting refrigerant tubing lengths to a minimum. The unit must be installed to allow a free air flow to the condenser coils.

If several units are installed adjacent to each other, care must be taken to avoid recirculation of air from one condenser to another. In all installations, adequate space must be provided for installation and servicing.

**FIGURE 3
CLEARANCES**



The unit must not be connected to any duct work. Do not locate unit under a roof drip; if necessary, install gutters, etc., to prevent water run-off from hitting the unit. To prevent air recirculation, it is recommended that the unit not be installed under an overhang, but if necessary **allow a minimum of 60 inches above the unit for air discharge.**

NOTE: To prevent the possibility of freeze damage, you can install an air proving switch in the air handler supply duct wired in series with the compressor contactor coil (24V) which would lock out the compressor in the event of air flow failure.

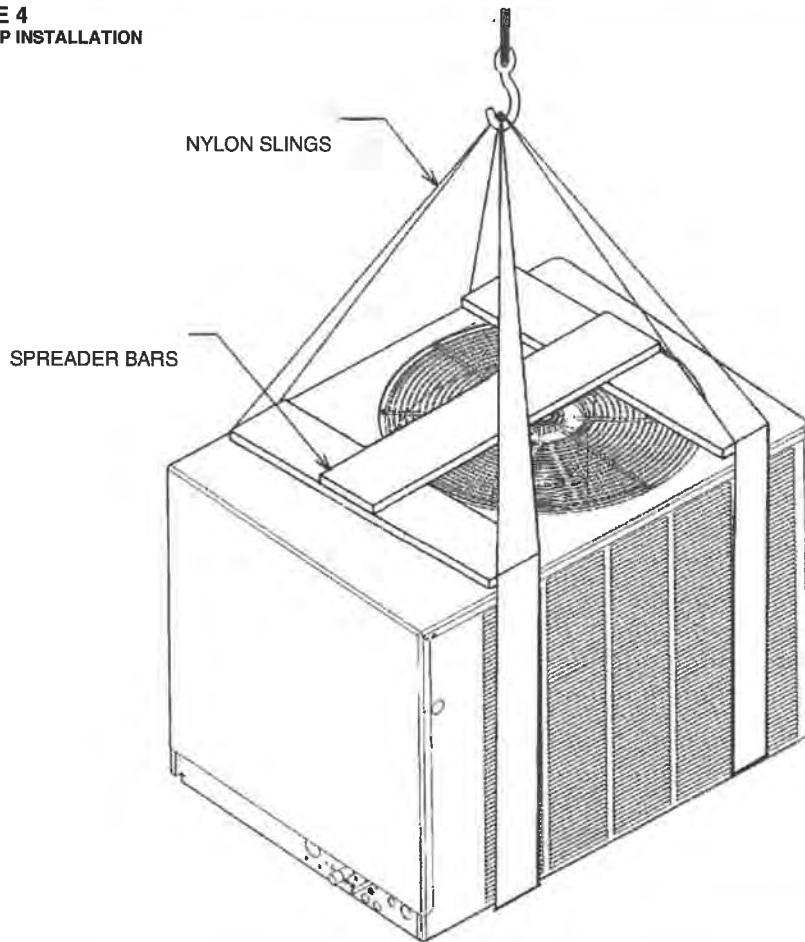
F. ROOFTOP INSTALLATION (REFER TO FIGURE 4)

If rooftop installation is required, make certain that the building construction is adequate for the weight of the unit. (Refer to physical data chart.) Before placing the unit on the roof, make certain that the nylon rigging slings are of sufficient length to maintain equilibrium of the unit when lifting. Under no circumstances should the unit be lifted by only one corner for rooftop installation.

G. SLAB INSTALLATION

Condensing units should be set on a solid level foundation. When installed at ground level, the unit should be placed on a 6 inch cement slab. If the pad is formed at the installation site, do not pour the pad tight against the structure, otherwise vibration will be transmitted from the unit through the pad.

FIGURE 4
ROOFTOP INSTALLATION



VIII. REFRIGERANT PIPING DATA

CONDENSING UNITS ARE SHIPPED WITH A NITROGEN HOLDING CHARGE.
EVACUATE CONDENSING UNIT BEFORE CHARGING WITH REFRIGERANT.

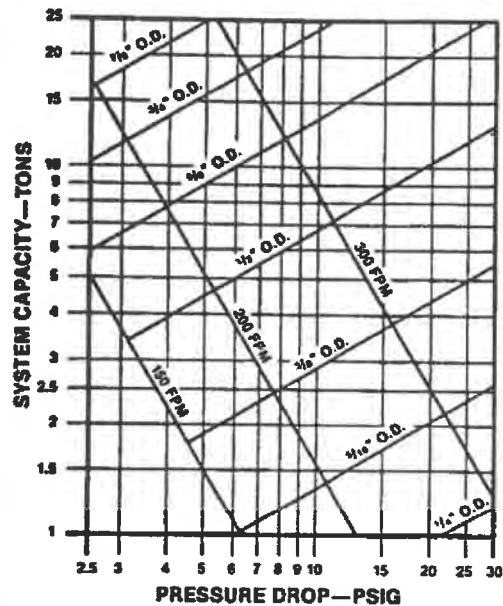
TABLE 3
REFRIGERANT PIPING DATA

Equivalent Length (ft.) [m] of straight type "L" tubing for non-ferrous valves and fittings (brazed).												
Tube Size, O.D.	Solenoid Valve		Angle Valve		Short Radius El		Long Radius El		Tee, Line flow		Tee, Branch Flow	
1/2	70	[21.3]	8.3	[2.5]	1.6	[0.5]	1.0	[0.3]	1.0	[0.3]	3.1	[0.9]
5/8	72	[21.9]	10.4	[3.2]	1.9	[0.6]	1.2	[0.4]	1.2	[0.4]	3.6	[1.1]
3/4	75	[22.9]	12.5	[3.8]	2.1	[0.7]	1.4	[0.4]	1.4	[0.4]	4.2	[1.3]
7/8	78	[23.8]	14.6	[4.4]	2.4	[0.7]	1.6	[0.5]	1.6	[0.5]	4.8	[1.5]
1 1/8			18.8	[5.7]	3.0	[0.9]	2.0	[0.6]	2.0	[0.6]	6.0	[1.8]
1 3/8			22.9	[7.0]	3.6	[1.1]	2.4	[0.7]	2.4	[0.7]	7.2	[2.2]
1 5/8			27.1	[8.3]	4.2	[1.3]	2.8	[0.8]	2.8	[0.8]	8.4	[2.6]
2 1/8			35.4	[10.8]	5.3	[1.6]	3.5	[1.1]	3.5	[1.1]	10.7	[3.3]

WARNING

DO NOT USE OXYGEN TO PURGE LINES OR PRESSURE SYSTEM FOR LEAK TEST. OXYGEN REACTS VIOLENTLY WITH OIL, WHICH CAN CAUSE AN EXPLOSION RESULTING IN SEVERE PERSONAL INJURY OR DEATH.

FIGURE 5
LIQUID LINE PRESSURE DROP PER 100 FEET EQUIVALENT LENGTH
(TYPE L COPPER TUBING)



NOTES:

1. When evaporator coil is above condenser, the pressure drop due to vertical lift (.5 PSIG per foot of lift) **must** be added to the pressure drop derived from this curve.
2. Size liquid line for **no more** than 10°F loss (approximately 50 PSIG total pressure drop).
3. **Do not oversize liquid line.** Oversized liquid lines add significantly to the amount of refrigerant required to charge the system.
4. The maximum recommended velocity with solenoid valves or other quick closing devices in the liquid line is 300 FPM.

A. INSTALLATION OF PIPING

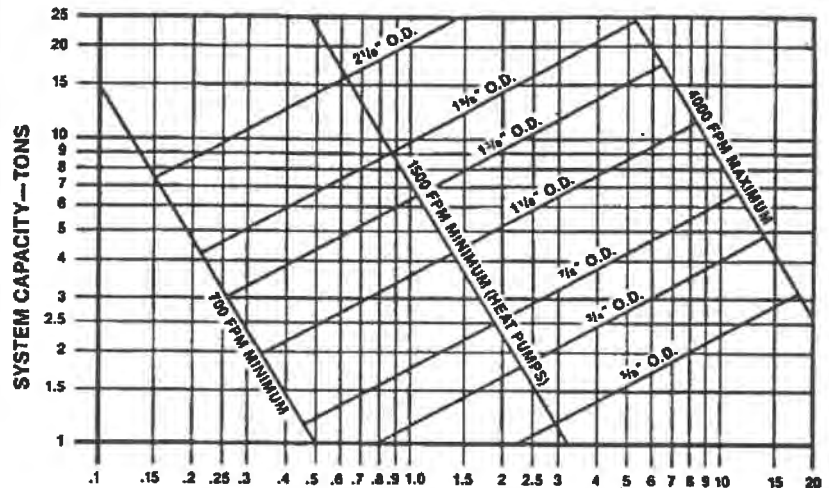
Once located, the condensing unit is ready to be interconnected with the evaporator using **ONLY** refrigeration grade dehydrated tubing. The following should be considered when connecting the tubing.

1. Pitch the suction line toward the compressor approximately ½ inch every 10 feet to facilitate oil return.
2. It is recommended that the sight glass, filter drier and liquid line solenoid valve be installed in the liquid line just prior to the evaporator.
3. Silver solder (such as silfos, Easy Flow, etc.) should be used for all refrigerant joints.
4. Thoroughly clean all joints before fluxing. **DO NOT USE ACID FLUX.**
5. When fluxing, limit the application of paste to the minimum and always apply flux to the male portion of the connection.
6. Suction lines should be insulated to prevent condensate drip. Use insulation of at least ¾ inch wall thickness. The insulation should be installed on the tubing prior to making the sweat connections.

7. Insulate the liquid line whenever the heat pick-up or transfer can affect the sub-cooling.
8. Care should be taken to avoid transmission of noise or vibration to building structure.

FIGURE 6

**SUCTION LINE SYSTEM CAPACITY LOSS IN PERCENT PER 100 FEET EQUIVALENT LENGTH
(TYPE L COPPER TUBING)**



NOTES:

1. The minimum velocity line (700 fpm) is recommended for cooling only units with vertical or horizontal run refrigerant lines.
2. For suction pressure drop (PSIG), multiply percent (%) loss by 1.18.

B. TYPICAL PIPING RECOMMENDATIONS

REFRIGERANT PIPING:

The following will be of help in accomplishing a successful installation.

1. Size liquid line for no more than 10°F loss which corresponds to approximately 50 PSIG pressure drop.
2. Size suction lines for no more than 2°F loss which corresponds to approximately 5 PSIG pressure drop.
3. Install sight glass, filter drier and solenoid valve in liquid line adjacent to evaporator. Filter drier should be between the condensing unit and sight glass.
4. Pitch all horizontal suction lines downward in the direction of flow. (1/2" to 10 ft. run)

5. When making up refrigerant piping, take every precaution to prevent dirt and moisture from entering the piping.
6. Locate the condensing unit and evaporator(s) as close together as possible to minimize piping runs.
7. Liquid or suction lifts not to exceed 60 ft.

TABLE 4
RECOMMENDED VAPOR AND LIQUID LINE SIZES FOR VARIOUS LENGTHS OF RUN

EQUIVALENT LENGTH TO EVAPORATOR (FEET)	LIQUID LINE O.D. SIZES (INCHES)		VAPOR LINE O.D. SIZES (INCHES)	
	078	090	078	090
0' to 15'	½	½	1½	1½
16' to 50'	½	½	1½	1½
51' to 100'	½	½	1½	1½
101' to 150'	½	½	1½	1½

NOTE: Runs between condenser and evaporator not to exceed 150' linear equivalent length.

FIGURE 7
COIL BELOW CONDENSING UNIT

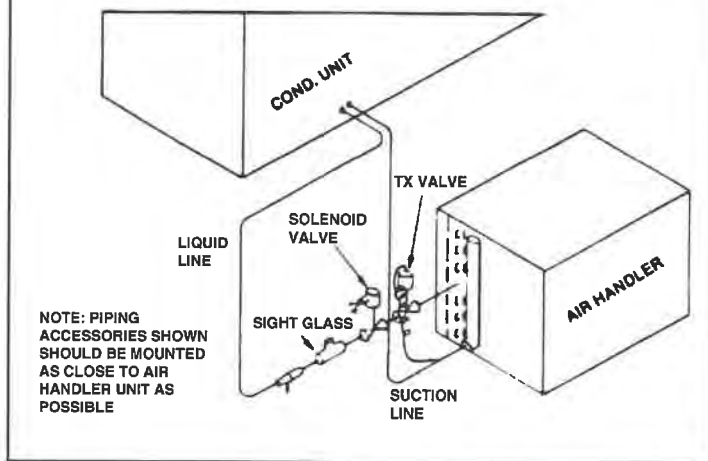
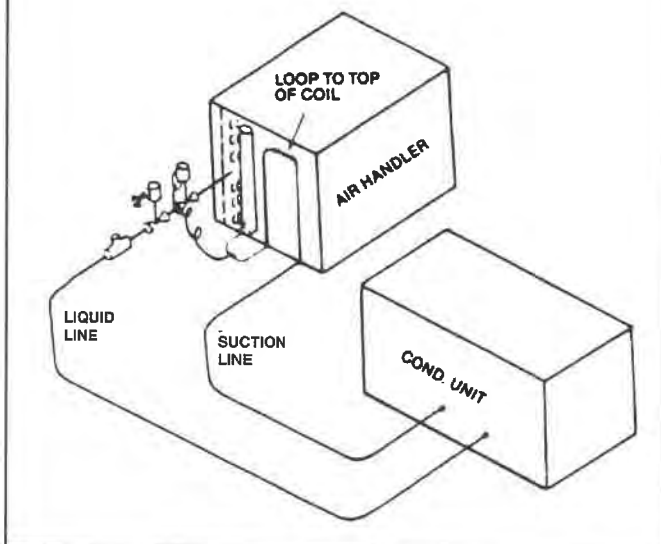


FIGURE 8
COIL ABOVE CONDENSING UNIT



WARNING

THIS UNIT MUST BE PERMANENTLY GROUNDED. A GROUND LUG IS PROVIDED NEAR THE CONTACTOR FOR A GROUND WIRE. FAILURE TO DO SO CAN CAUSE A FIRE OR ELECTRICAL SHOCK RESULTING IN PROPERTY DAMAGE, SEVERE PERSONAL INJURY OR DEATH.

VIX. WIRING

NOTE: Field wiring must comply with the National Electric Code (NEC in Canada) and any local ordinance that may apply.

X. ELECTRICAL POWER

It is important that proper electrical power is available at the unit. Voltage must not vary more than 10% of that stamped on the rating plate. (See Electrical Data Table for minimum and maximum voltage.) Interphase voltage variation on three-phase units must not be more than 3%. Contact local power company for correction of improper voltage or phase unbalance.

IMPORTANT: Models equipped with scroll compressors must be phased correctly for proper compressor rotation. If the compressor is noisy or if suction and discharge pressures do not appear normal, reverse any two power leads to the unit. Extended run time in reverse rotation will damage the compressor and lead to premature failure.

XI. POWER WIRING

Power wiring must be run in grounded rain-tight conduit. Power wiring must comply with the National Electric Code (NEC in Canada) and any applicable local code.

XII. WIRE ROUTING

POWER WIRING MUST BE RUN IN CONDUIT. Conduit must be run through the connector panel below the service cover and attached to the bottom of the control box.

If low (extra-low in Canada) voltage control wire is run in conduit with power supply, Class I insulation is required. If run separate, Class II is required. Low voltage wiring may be run through the insulated bushing provided in the 7/8" hole in the connector panel then routed to the control box.

WARNING

AFTER COMPLETION OF WIRING CHECK ALL ELECTRICAL CONNECTIONS, INCLUDING FACTORY WIRING WITHIN THE UNIT, AND MAKE SURE ALL CONNECTIONS ARE TIGHT, REPLACE AND SECURE ALL ELECTRICAL BOX COVERS AND ACCESS DOORS BEFORE LEAVING UNIT OR TURNING ON POWER TO CIRCUIT SUPPLY UNIT. FAILURE TO DO SO CAN CAUSE A FIRE OR ELECTRICAL SHOCK RESULTING IN PROPERTY DAMAGE, PERSONAL INJURY OR DEATH.

XIII. GROUNDING

A grounding lug is provided in control box for a ground wire.

Grounding may be accomplished by grounding the power line conduit to the unit.

XIV. THERMOSTAT — 6½ AND 7½ TON

A single-stage cooling, two-stage heating (if heating is used) thermostat should be mounted on an inside wall about four to five feet above the floor in a location where it will not be affected by the sun or drafts, from open doors or other sources. Install, level, and after installation check the thermostat calibration and recalibrate if necessary.

XV. LEAK TESTING

Pressure line set and coil through service fittings with dry nitrogen to 150 psig maximum. Leak test all joints using liquid detergent. If a leak is found, recover pressure and repair.

XVI. R-410A REFRIGERANT

A. TOOLS REQUIRED FOR INSTALLING & SERVICING R-410A MODELS

Manifold Sets:

- Up to 800 PSIG High Side
- Up to 250 PSIG Low Side
- 550 PSIG Low Side Retard

Manifold Hoses:

- Service Pressure Rating of 800 PSIG

Recovery Cylinders:

- 400 PSIG Pressure Rating
- Dept. of Transportation 4BA400 or BW400

⚠ CAUTION

R-410A systems operate at higher pressures than R-22 systems. Do not use R-22 service equipment or components on R-410A equipment.

B. SPECIFICATION OF R-410A:

Application: R-410A is not a drop-in replacement for R-22; equipment designs must accommodate its higher pressures. It cannot be retrofitted into R-22 condensing units.

Physical Properties: R-410A has an atmospheric boiling point of -62.9°F and its saturation pressure at 77°F is 224.5 psig.

Composition: R-410A is an azeotropic mixture of 50% by weight difluoromethane (HFC-32) and 50% by weight pentafluoroethane (HFC-125).

Pressure: The pressure of R-410A is approximately 60% (1.6 times) greater than R-22. Recovery and recycle equipment, pumps, hoses and the like need to have design pressure ratings appropriate for R-410A. Manifold sets need to range up to 800 psig high-side and 250 psig low-side with a 550 psig low-side retard. Hoses need to have a service pressure rating of 800 psig. Recovery cylinders need to have a 400 psig service pressure rating. DOT 4BA400 or DOT BW400.

Combustibility: At pressures above 1 atmosphere, mixture of R-410A and air can become combustible. R-410A and air should never be mixed in tanks or supply lines, or be allowed to accumulate in storage tanks. Leak checking should never be done with a mixture of R-410A and air. Leak checking can be performed safely with nitrogen or a mixture of R-410A and nitrogen.

C. QUICK REFERENCE GUIDE FOR R-410A

- R-410A refrigerant operates at approximately 60% higher pressure (1.6 times) than R-22. Ensure that servicing equipment is designed to operate with R-410A.
- R-410A refrigerant cylinders are pink in color.
- R-410A, as with other HFC's, is only compatible with POE oils.
- Vacuum pumps will not remove moisture from oil.
- R-410A systems are to be charged with liquid refrigerants. Prior to March 1999, R-410A refrigerant cylinders had a dip tube. These cylinders should be kept upright for equipment charging. Post March 1999 cylinders do not have a dip tube and should be inverted to ensure liquid charging of the equipment.
- Do not install a suction line filter drier in the liquid line.
- A liquid line filter drier is standard on every unit. Only manufacturer approved liquid line filter driers can be used. These filter driers are rated for minimum working pressure of 600 psig.
- Desiccant (drying agent) must be compatible for POE oils and R-410A.

D. REPLACEMENT UNITS

To prevent failure of a new condensing unit, the existing evaporator tubing system must be correctly sized and cleaned or replaced. Care must be exercised that the expansion device is not plugged. For new and replacement units, a liquid line filter drier should be installed and refrigerant tubing should be properly sized. Test the oil for acid. If positive, a suction line filter drier is mandatory.

IMPORTANT: WHEN REPLACING AN R-22 UNIT WITH AN R-410A UNIT, EITHER REPLACE THE LINE SET OR ENSURE THAT THE EXISTING LINE SET IS THOROUGHLY CLEANED OF ANY OLD OIL OR DEBRIS.

⚠ CAUTION

Only use evaporators approved for use on R-410A systems. Use of existing R-22 evaporators can introduce mineral oil to the R-410A refrigerant forming two different liquids and decreasing oil return to the compressor. This can result in compressor failure.

E. EVAPORATOR COIL

REFER TO EVAPORATOR COIL MANUFACTURER'S INSTALLATION INSTRUCTIONS:

IMPORTANT: The manufacturer is not responsible for the performance and operation of a mismatched system, or for a match listed with another manufacturer's coil.

XVII. EVACUATION AND CHARGING

The evacuation of any system component that has been exposed to atmosphere or lost its charge is essential before charging. Never attempt to operate a system while it is under a vacuum.

FIGURE 9
TYPICAL FIELD WIRING CONNECTIONS — 6½ AND 7½ TON

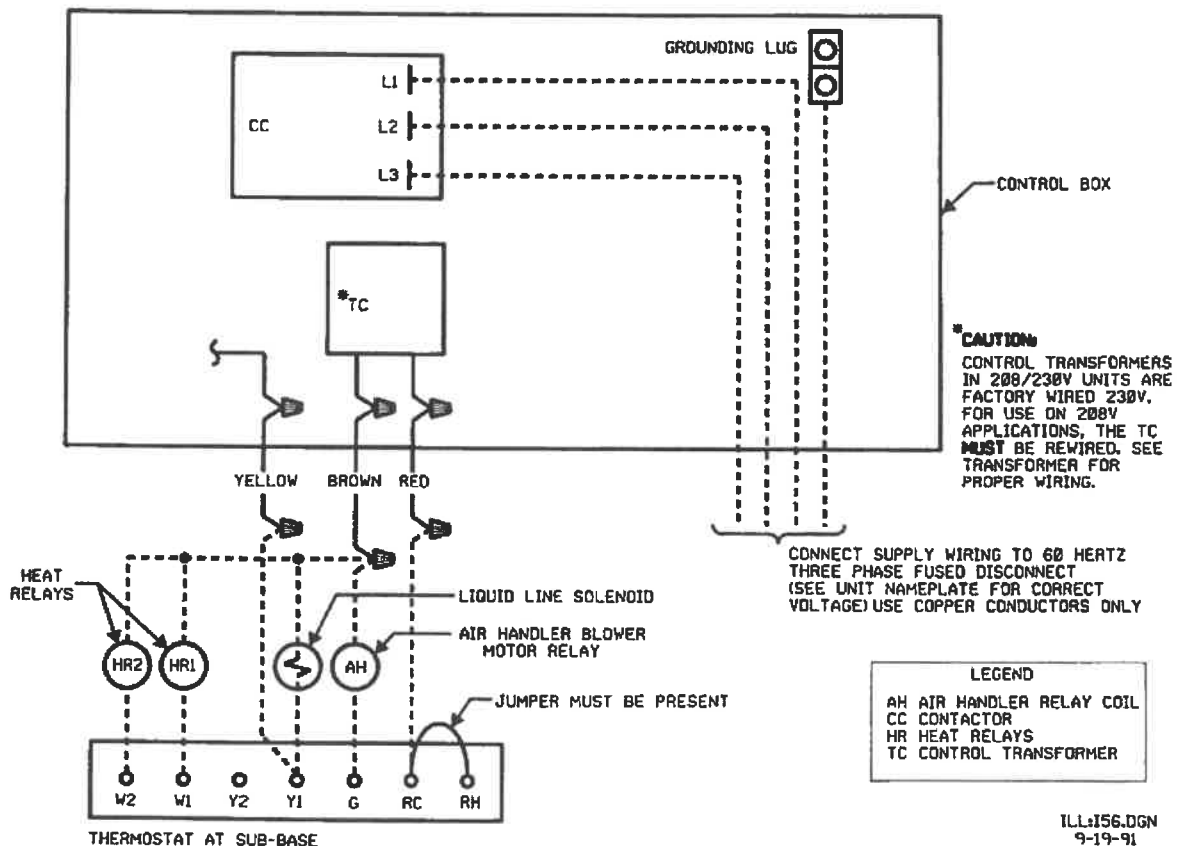


TABLE 5

FIELD WIRE SIZE FOR 24 VOLT THERMOSTAT CIRCUITS						
Thermostat Load - Amps	SOLID COPPER WIRE - AWG					
	16	14	12	10	10	10
	16	14	12	12	10	10
	18	16	14	12	12	10
Length of Run - Feet (1)						
	50	100	150	200	250	300

(1) Wire length equals twice the run distance.

NOTE: The condensing unit is shipped with a holding charge of dry nitrogen which must be purged from the unit before evacuation.

1. Since the condensing unit itself must be evacuated, open the suction, discharge and liquid shut-off valves.
2. Use a refrigeration type vacuum pump capable of evacuation in the 500 micron range.
3. Connect the vacuum pump to the service manifold assembly with a pressure gauge that will read 30 inches vacuum. Connect the service manifold to the suction line schrader valve port.
4. With an accurate scale, $\frac{1}{2}$ oz., set refrigerant tank up so its weight can be measured while in a position to charge liquid. (Unit must be off.) Energize liquid line solenoid valve by wiring valve to 24V power supply (or open by manual stem if applicable).
5. Connect to the liquid shut-off valve port. Shut off tank and evacuate the system. The pressure gauge should read at least 29.5" of vacuum.
6. Triple evacuate the system.
7. The refrigerant system will now be free of noncondensables.
8. Remove vacuum pump from 3-way valve.
9. Install refrigerant tank (liquid charging) to service valve.
10. Before tightening, purge tank and service valve hose.

CHARGING HINTS

SYMPTOM	POSSIBLE CAUSE	REMEDY
High head pressure	a. Air flow to or from condenser restricted or dirty condenser b. Faulty condenser fan or motor. c. Overcharge of refrigerant d. Air in system.	a. Remove obstruction, relocate condensing unit, if necessary clean condenser. b. Replace. c. Reduce charge. d. Evacuate and recharge.
Low head pressure	a. Short of refrigerant. b. Low evaporator air flow.	a. Check for leak, add charge. b. Increase blower speed, check filters.
Low vapor & hot compressor	a. Short of refrigerant.	a. Check for leak—add refrigerant.
Excessive sweating	a. Low indoor airflow b. Excess refrigerant	a. Increase speed of air handler blower or reduce restriction—replace air filter. b. Slowly reduce charge.

11. Note weight of refrigerant tank.
12. De-energize liquid line solenoid valve. Open refrigerant tank valve. Allow pressure in tank and unit to equalize.
13. Close off service valve to liquid port and note weight of refrigerant tank.
14. Position tank for gas charging.
15. Re-wire liquid line solenoid to thermostat control. Close main disconnect switch and turn thermostat to lowest setting.
16. Charge unit per chart.
17. Adjust refrigerant charge to obtain pressures indicated (refer to Table 6).

TABLE 6
REQUIRED OZS. R-410A PER FT. OF TUBING

Tube Size O.D., In.	Liquid oz/ft	Vapor oz/ft
1/2	1.06	0.04
5/8	1.65	0.07
3/4	2.46	0.10
7/8	3.28	0.13
1 1/8		0.22
1 3/8		0.34
1 5/8		0.48
2 1/8		0.84

Quantities based on 110°F liquid and 45°F vapor.

BASIC SYSTEM CHARGE*

Unit Model	Basic System Charge, Oz. [g] *
RAWL-078	178 [5046]
RAWL-090	242 [6861]

*-System with 0 Feet [0] of tubing.

18. Note weight of refrigerant tank.
19. When system has stabilized, check superheat at the suction line service valve. The actual line temperature should be 15° to 25°F higher than the saturation temperature corresponding to the suction pressure. If superheat is measured at evaporator, the actual line temperature should be 15° to 20° higher than the saturation temperature corresponding to the suction pressure.
20. Close service ports on suction and liquid valves. Remove service gauges.
21. Replace service port caps and valve stem caps. These caps must be replaced to prevent leaks.
22. Record total charge quantity on rating plate.

XVIII. SEQUENCE OF OPERATION — 6½ AND 7½ TON

1. When the room temperature is higher than the thermostat setting, the thermostat contacts close and energize the compressor contactor (CC) through the high pressure, and low pressure controls. If the unit has "short cycled" and the optional time delay (TDC) has been supplied, the contactor coil (CC) will remain de-energized for up to five (5) minutes.
2. The system will continue cooling operation, as long as the contacts of all safety devices are closed and until the thermostat is satisfied.
3. When the thermostat is satisfied, compressor or contactor (CC) is de-energized.

XIX. ACCESSORIES

A. ANTI-SHORT CYCLE TIMER

ANTI-SHORT-CYCLE TIMER — Prevents restarting of unit for five minutes if shut down for any reason. (See wiring diagram and schematic in this manual for proper location and installation; item TDC.)

FIGURE 10
ANTI-SHORT CYCLE TIMER



NOTE: These units must be installed outdoors. No ductwork can be attached, or other modifications made, to the discharge grille. Modifications will affect performance or operation.

B. DISCHARGE PRESSURE CONTROL

Outdoor fan motor speed control designed to regulate condenser head pressure at low ambients by varying the air volume through the condenser. Has been tested and is available through the parts department.

C. LIQUID LINE SOLENOID VALVE

LIQUID LINE SOLENOID VALVE (24V) — Recommended for all split system applications, to prevent refrigerant migration during off cycles. See wiring connection (See Figure 11). Solenoid to be located in liquid line close to air handler.

FIGURE 11
LIQUID LINE SOLENOID VALVE



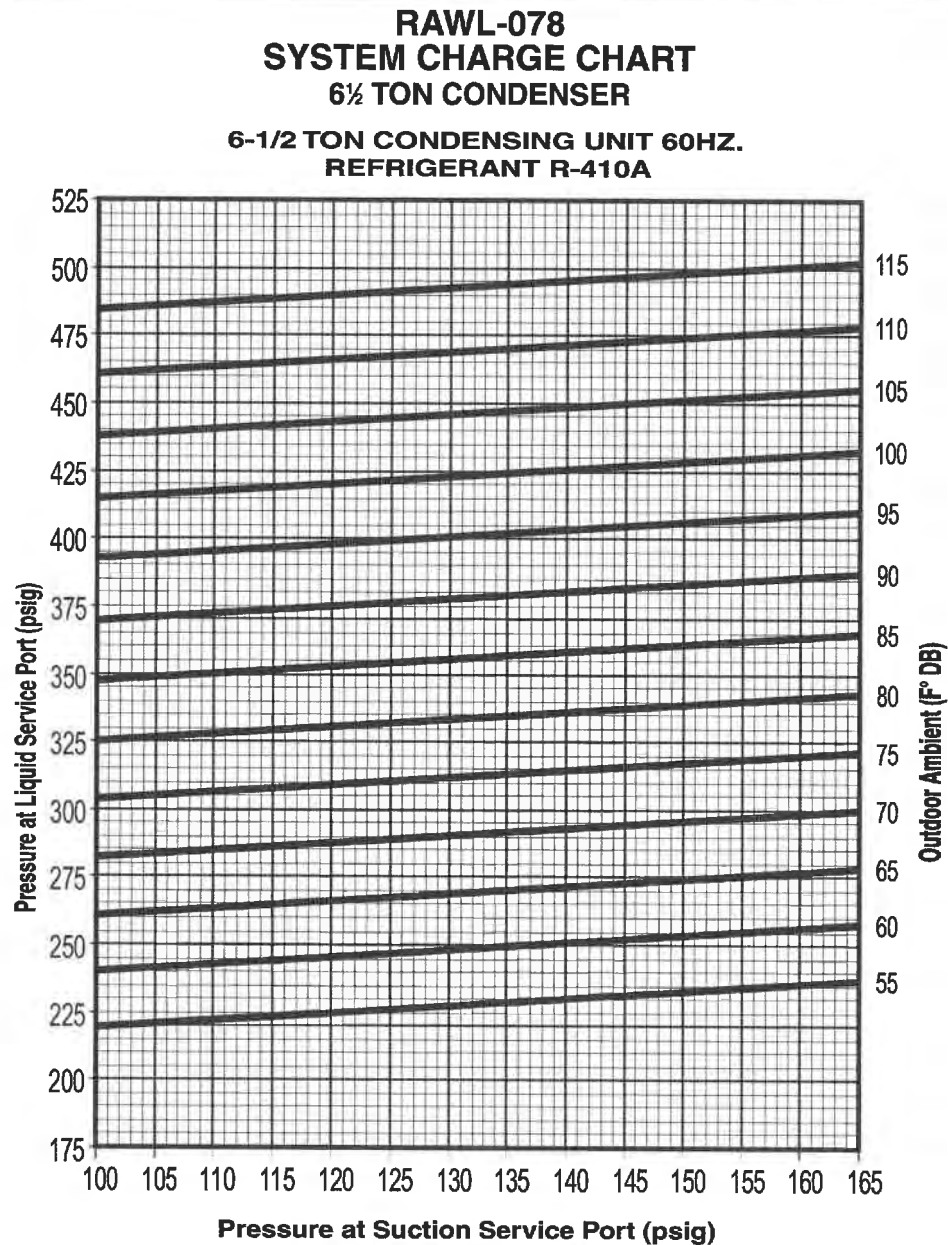
D. SIGHT GLASS

SIGHT GLASS — Allows viewing of the refrigerant. Bubbles may indicate a shortage of refrigerant or a restriction in the liquid line. The color indicator shows relative moisture saturation of the refrigerant. Its inclusion in the refrigerant piping is recommended. A minimum of 12 hours after installation is required before attempting to determine if a moisture condition within the system exists.

XX. MISCELLANEOUS

A. CHARGE CHARTS

FIGURE 12



REQUIRED OUNCES R-410A CHARGE PER FOOT OF TUBING		
TUBE SIZE O.D. IN.	LIQUID LINE	VAPOR LINE
1/2	1.06	
5/8	1.65	
1-1/8		.22
1-3/8		.34

REFRIGERANT REQUIRED: 178 OZ. WITH 0 FT. OF SUCTION AND LIQUID LINE.

CAUTION: BEFORE FINAL REFRIGERANT CHECK, INDOOR AIR TEMPERATURE SHOULD BE AT COMFORT CONDITIONS FOR MOST ACCURATE RESULTS.

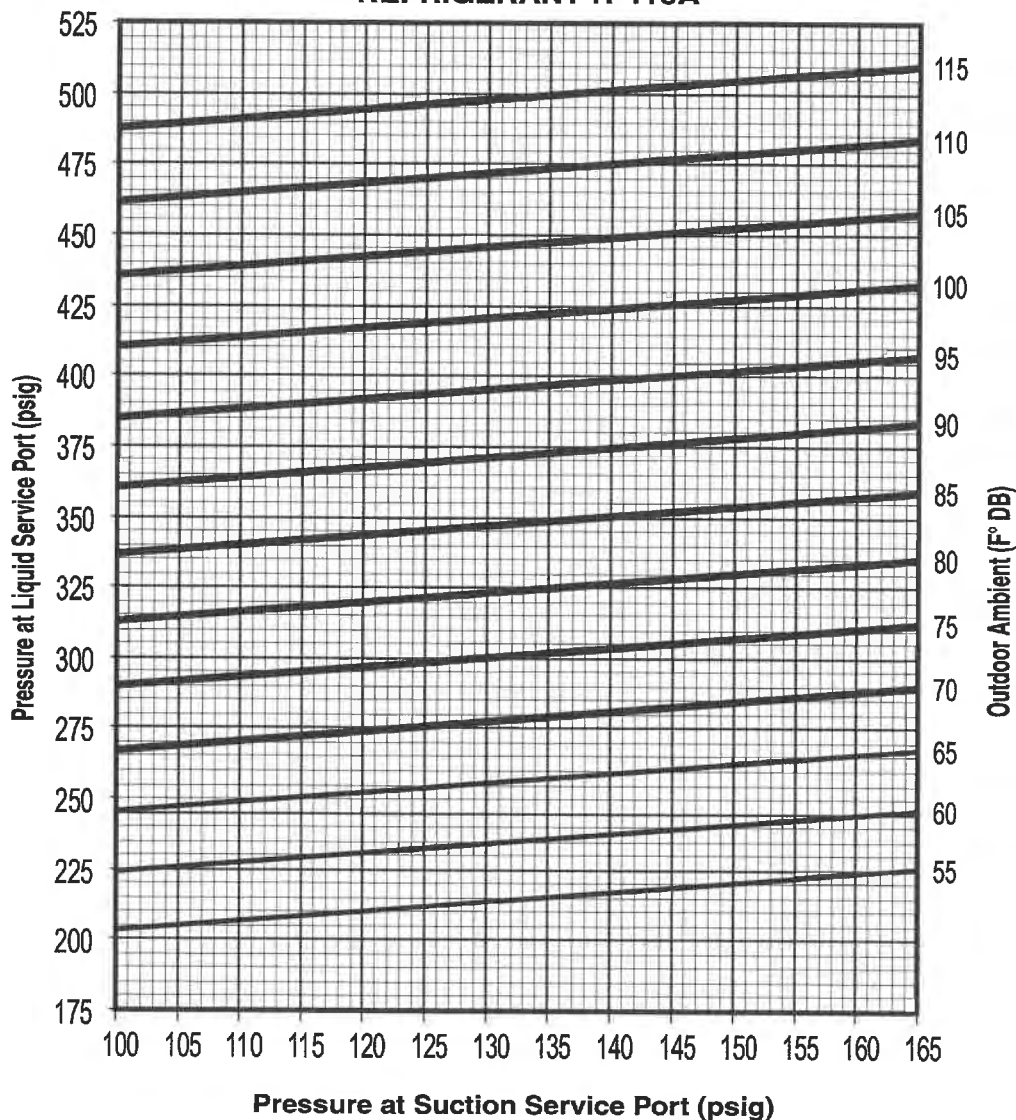
INSTRUCTIONS:

1. CONNECT PRESSURE GAUGES TO SUCTION AND LIQUID PORTS ON UNIT.
2. MEASURE AIR TEMPERATURE TO OUTDOOR COIL.
3. PLACE AN "X" ON THE APPROPRIATE CHART WHERE THE SUCTION AND LIQUID PRESSURES CROSS.
4. IF "X" IS BELOW AMBIENT TEMPERATURE LINE, ADD CHARGE AND REPEAT STEP 3.
5. IF "X" IS ABOVE AMBIENT TEMPERATURE LINE, RECOVER EXCESS CHARGE AND REPEAT STEP 3.
6. IF CONDENSER FANS ARE NOT RUNNING, THE HEAD PRESSURE CONTROL MAY REQUIRE JUMPERING.

92-102644-01-01

FIGURE 13

**RAWL-090
SYSTEM CHARGE CHART
7½ TON CONDENSER WITH 10 TON EVAPORATOR
7-1/2 TON CONDENSING UNIT 60HZ.
REFRIGERANT R-410A**



REQUIRED OUNCES R-410A CHARGE PER FOOT OF TUBING		
TUBE SIZE O.D. IN.	LIQUID LINE	VAPOR LINE
1/2	1.06	
5/8	1.65	
1-1/8		.22
1-3/8		.34

REFRIGERANT REQUIRED: 239 OZ. WITH 0 FT. OF SUCTION AND LIQUID LINE

CAUTION: BEFORE FINAL REFRIGERANT CHECK, INDOOR AIR TEMPERATURE SHOULD BE AT COMFORT CONDITIONS FOR MOST ACCURATE RESULTS.

INSTRUCTIONS:

1. CONNECT PRESSURE GAUGES TO SUCTION AND LIQUID PORTS ON UNIT.
2. MEASURE AIR TEMPERATURE TO OUTDOOR COIL.
3. PLACE AN "X" ON THE APPROPRIATE CHART WHERE THE SUCTION AND LIQUID PRESSURES CROSS.
4. IF "X" IS BELOW AMBIENT TEMPERATURE LINE, ADD CHARGE AND REPEAT STEP 3.
5. IF "X" IS ABOVE AMBIENT TEMPERATURE LINE, RECOVER EXCESS CHARGE AND REPEAT STEP 3.
6. IF CONDENSER FANS ARE NOT RUNNING, THE HEAD PRESSURE CONTROL MAY REQUIRE JUMPING.

92-102644-03-01

B. MAINTENANCE AND OPERATION

1. All access panels must be in place when unit is in operation.
2. For maximum efficiency, the condenser coil must be kept clean. Periodic inspections, depending on local conditions are recommended. If it is necessary to clean the condenser coil, use a common garden hose.
3. Never operate the unit without filters installed in the air handler.
4. If a compressor crankcase heater is used, it must be turned on 12 hours prior to starting the compressor.

1. CONTACTOR

The contactor is an electrical switch which operates the compressor and condenser fans. Its 24 volt coil is activated either directly or indirectly by the room thermostat.

2. HIGH PRESSURE SWITCH (HPC)

Opens the contactor (24 volt) circuit on high refrigerant pressure—Manual Reset—check for cause of tripping before putting unit back in service.

3. LOW PRESSURE SWITCH (LPC)

Acts as safety against loss of refrigerant and low evaporator temperatures.

4. PRE-START CHECK

PRE-START CHECK

1. Is condensing unit properly located and level?	10. Is refrigerant tubing neatly run and suction line thoroughly insulated?
2. Is air free to travel to and from condensing unit?	11. Is condensate drain line properly sized, run, trapped and pitched?
3. Is the wiring correct and according to the unit wiring diagram?	12. Are refrigerant connections tight and leak tested?
4. Are wiring connections tight? (Including those in unit and compressor electrical box.)	13. Is filter clean and in place?
5. Is the unit properly grounded?	14. Does the condenser fan turn free without rubbing?
6. Is circulating air blower correctly wired?	15. Is the fan tight on the fan shaft?
7. Is condensing unit properly fused?	16. Are all covers and access panels in place to prevent air loss?
8. Is the thermostat level, correctly wired and in a good location?	17. Are refrigerant valves open for full flow?
9. Is the ductwork correctly sized, run, taped and insulated?	

C. TROUBLESHOOTING

▲ WARNING

DISCONNECT ALL POWER TO UNIT BEFORE SERVICING. CONTACTOR MAY BREAK ONLY ONE SIDE. FAILURE TO SHUT OFF POWER CAN CAUSE ELECTRICAL SHOCK RESULTING IN PERSONAL INJURY OR DEATH.

SYMPTOM	POSSIBLE CAUSE	REMEDY
Unit will not run	- Power off or loose electrical connection - Thermostat out of calibration-set too high - Defective contactor - Blown fuses - Transformer defective - High pressure control open (if provided) - Interconnecting low voltage wiring damaged.	- Check for correct voltage at compressor contactor in control box - Reset - Check for 24 volts at contactor coil - replace if contacts are open - Replace fuses - Check wiring-replace transformer - Reset-also see high head pressure remedy-The high pressure control opens at 610 PSIG - Replace thermostat wiring
Condenser fan runs, compressor doesn't	- Run or start capacitor defective (single phase only) - Start relay defective (single phase only) - Loose connection - Compressor stuck, grounded or open motor winding, open internal overload. - Low voltage condition	- Replace - Replace - Check for correct voltage at compressor - check & tighten all connections - Wait at least 2 hours for overload to reset. If still open, replace the compressor. At compressor terminals, voltage must be within 10% of rating plate volts when unit is operating. - Add start kit components
Insufficient cooling	- Improperly sized unit - Improper airflow - Incorrect refrigerant charge - Air, non-condensibles or moisture in system - Incorrect voltage	- Recalculate load - Check - should be approximately 400 CFM per ton. - Charge per procedure attached to unit service panel - Recover refrigerant, evacuate & recharge, add filter drier - At compressor terminals, voltage must be within 10% of rating plate volts when unit is operating.
Compressor short cycles	- Incorrect voltage - Defective overload protector - Refrigerant undercharge	- At compressor terminals, voltage must be $\pm 10\%$ of nameplate marking when unit is operating. - Replace - check for correct voltage - Add refrigerant
Registers sweat	Low evaporator airflow	Increase speed of blower or reduce restriction - replace air filter
High head-low vapor pressures	- Restriction in liquid line, expansion device or filter drier - Flow check piston size too small - Incorrect capillary tubes - TXV does not open	- Remove or replace defective component - Change to correct size piston - Change coil assembly - Replace TXV
High head-high or normal vapor pressure - Cooling mode	- Dirty condenser coil - Refrigerant overcharge - Outdoor fan not running - Air or non-condensibles in system	- Clean coil - Correct system charge - Repair or replace - Recover refrigerant, evacuate & recharge
High head-high or normal vapor pressure - Heating mode	- Low air flow - condenser coil - Refrigerant overcharge - Air or non-condensibles in system - Dirty condenser coil	- Check filters - correct to speed - Correct system charge - Recover refrigerant, evacuate & recharge - Check filter - clean coil
Low head-high vapor pressures	- Defective Compressor valves - Defective TXV(s)	- Replace compressor - Replace coil assembly
Low vapor - cool compressor - iced evaporator coil	- Low evaporator airflow - Operating below 65°F outdoors - Moisture in system	- Increase speed of blower or reduce restriction - replace air filter - Add Low Ambient Kit - Recover refrigerant - evacuate & recharge - add filter drier
High vapor pressure	- Excessive load - Defective compressor	- Recheck load calculation - Replace
Fluctuating head & vapor pressure	- TXV hunting - Air or non-condensibles in system	- Check TXV bulb clamp - check air distribution on coil - replace TXV - Recover refrigerant, evacuate & recharge
Gurgles or pulsing noise at expansion device or liquid line	Air or non-condensibles in system	Recover refrigerant, evacuate & recharge



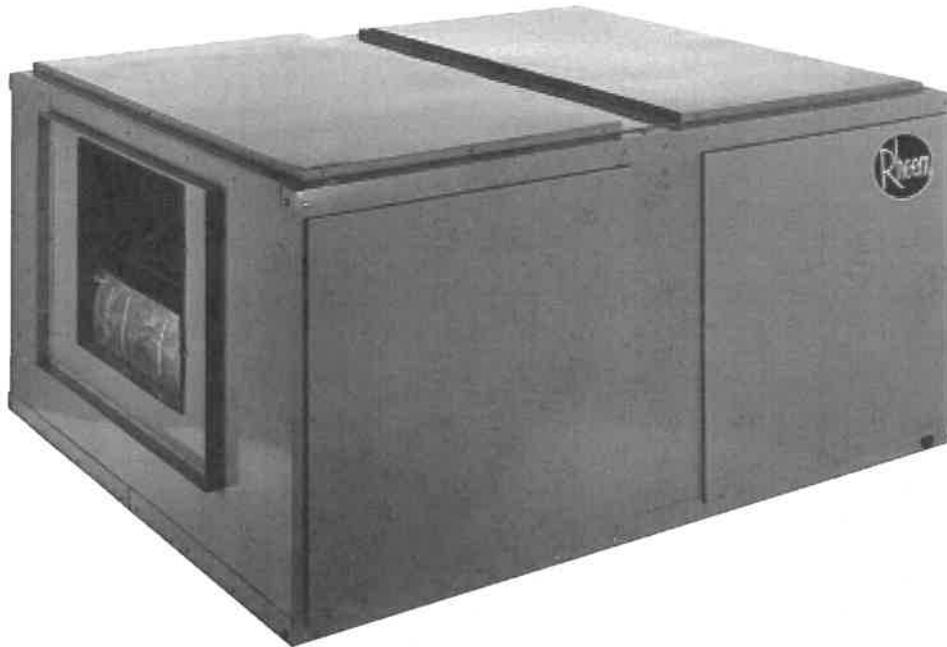
COMMERCIAL AIR HANDLER

FORM NO. H11-529 REV. 6
Supersedes Form No. H11-529 Rev. 5

Featuring Industry Standard R-410A Refrigerant

R-410A

RHGL- 090, 120, 180 & 240 SERIES
NOMINAL SIZES 7.5, 10, 15 & 20 TONS [26, 35, 53, & 70 kW]





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UNIT FEATURES/MODEL IDENTIFICATION—RHGL- SERIES

CABINET—Powder coat painted. Matching discharge plenums and decorative supply and return air grilles are available for use when units are to be installed within conditioned space.

MOTOR—Inherently protected motors are mounted inside of insulated cabinet to reduce motor noise. A choice of motor horsepower and drive combinations are available to allow you to meet specified CFM at various static pressures up to 2" [.498 kPa] external static pressure.

LOW PROFILE—Allows for horizontal installation in most standard drop ceiling applications, and the movement of units through most standard doorways for addition or replacement work.

THERMAL EXPANSION VALVES—Standard all models.

FILTERS—One inch [25 mm] throwaway filters are standard, but filter racks are designed to accept either one inch [25 mm] or two inch [51 mm] filters.

EVAPORATOR COIL—Two circuit, interlaced row split coils are constructed with copper tubes and aluminum fins mechanically bonded to the tubes for maximum heat transfer capabilities. All coil assemblies are leak tested up to 450 PSIG [3100 kPa] internal pressure prior to installation into units.

REFRIGERANT CONNECTIONS—Field piping connections are made through a fixed post between two side access panels on either side of the unit. Allows flexibility to meet most field conditions as well as full accessibility after the installation is complete.

Units may be used with two straight cool condensing units or single circuit manifolded in the field using the copper fittings shipped with each unit. The RHGL Air Handler has not been tested, rated or certified to operate with dual residential remote heat pumps.

DRAIN PAN—The galvanized steel drain pan is designed to trap condensate in either vertical or horizontal installations. Condensate drain connections are located on both sides of the unit allowing complete flexibility to meet most field conditions.

SERVICE ACCESS—Two removable panels on top and each side of the unit are easily removed for access to motors, blowers, sheaves, and filters.

HORIZONTAL OR VERTICAL—All models are designed for either application and can be installed in either position as supplied from the factory. (See page 22)

TESTING—All units are run tested at the factory prior to shipment. Units are shipped with a holding charge of nitrogen.



R H G L — 120 Z L

Drive Package (see page 8)
J = Optional (Field Supplied)

*K = Standard

L = Optional

M = Optional

N = Optional (Field Supplied)

O = Optional (Field Supplied)

Electrical Designation

*H = 115-230-1-60 (090/120 only)

Z = 208-230/460-3-60

Y = 575-3-60

Nominal Tons

090 = 7.5 Tons [26 kW]

120 = 10.0 Tons [35 kW]

180 = 15.0 Tons [53 kW]

240 = 20.0 Tons [70 kW]

Design Series

L = Refrigerant R-410A

Type

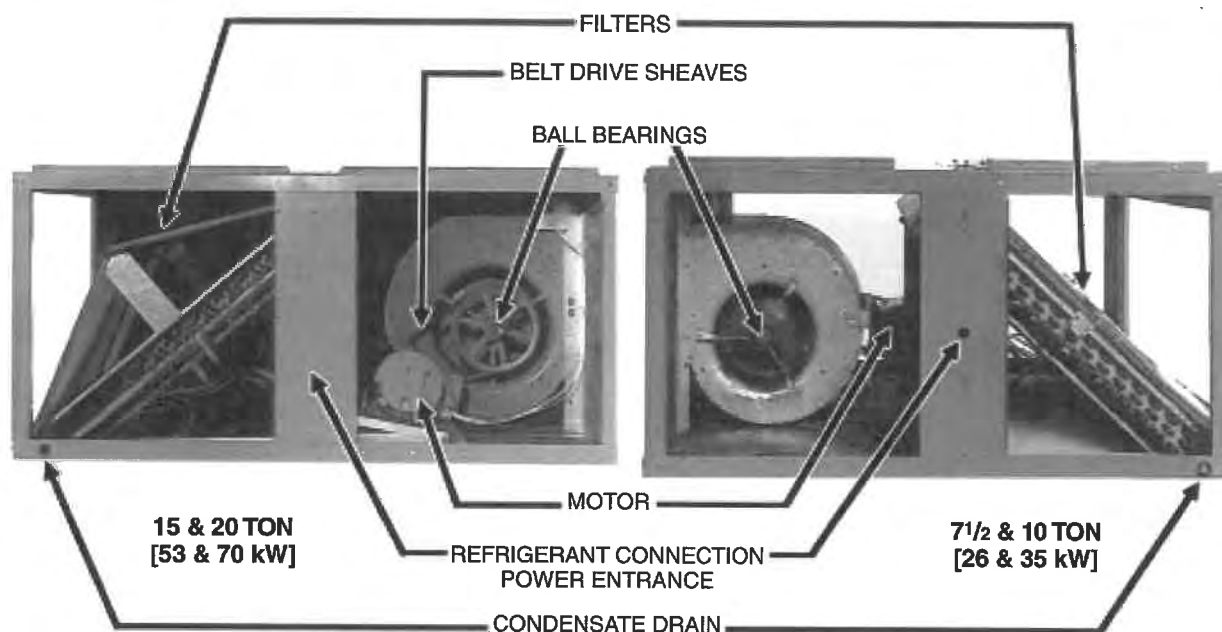
Air Handler

Rheem

**"H" voltage models are available
with "K" drive package only.

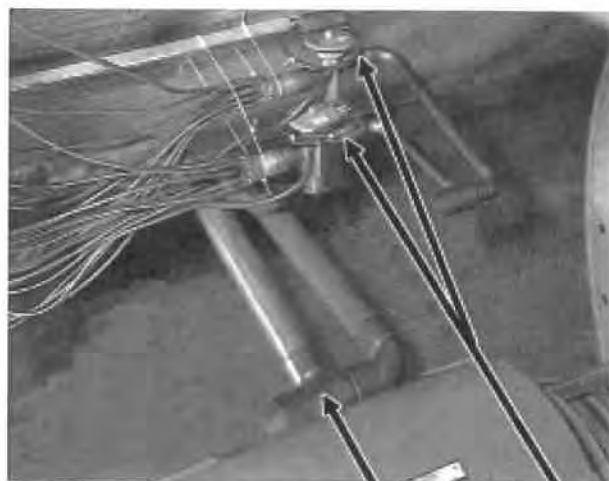
[] Designates Metric Conversions

COMPONENT LOCATION—RHGL- SERIES



15 ton [53 kW] & 20 ton [70 kW] unit with side panel removed for blower and air filter access.

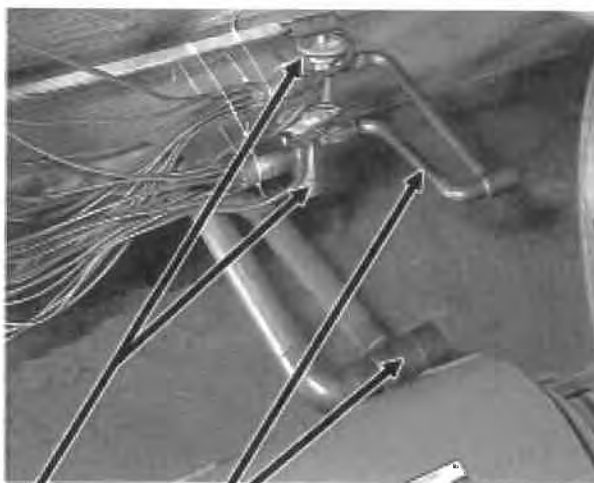
7 1/2 ton [26 kW] & 10 ton [35 kW] unit with side panel removed for coil connections and air filter access.



RHGL-
7 1/2-20 TON
[26-70 kW]

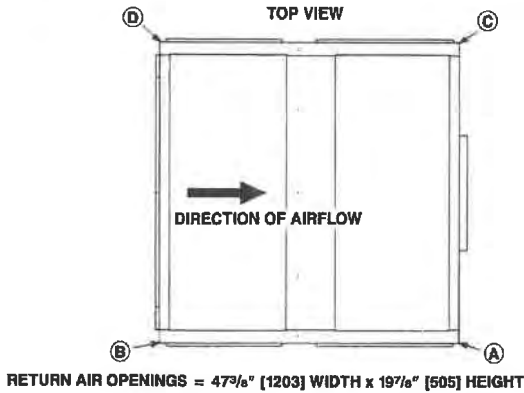
TX VALVES

SINGLE CIRCUIT MANIFOLD
REFRIGERANT CONNECTION
EITHER SIDE



RHGL-
7 1/2-20 TON
[26-70 kW]

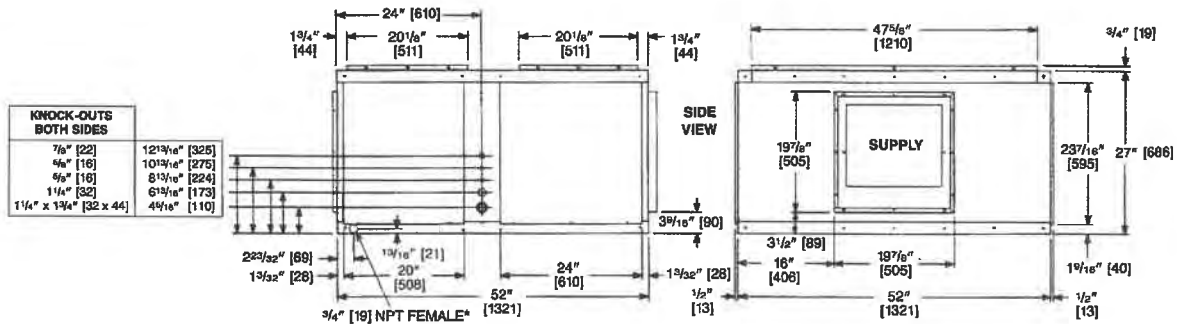
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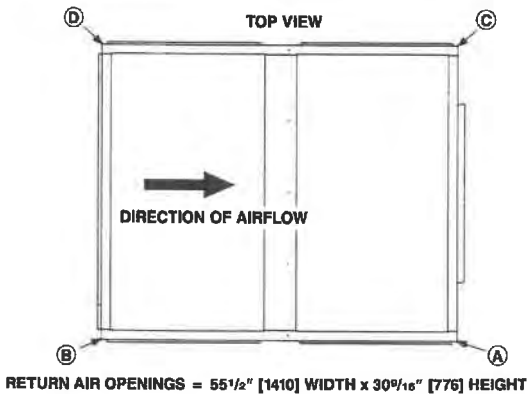
7¹/₂ AND 10 NOMINAL TONS [26 AND 35 kW]

MODEL	REFRIGERANT STUB SIZES, IN. [mm]			
	DUAL LIQ.	DUAL SUC.	SINGLE LIQ.	SINGLE SUC.
090	1/2, 1/2 [13, 13]	7/8, 7/8 [22, 22]	1/2 [13]	1 1/8 [29]
120	1/2, 1/2 [13, 13]	7/8, 7/8 [22, 22]	5/8 [16]	1 3/8 [35]

MODEL	CORNER WEIGHTS, LBS. [kg]				TOTAL WEIGHT
	A	B	C	D	
090	88 [40]	78 [35]	87 [39]	77 [35]	330 [150]
120	93 [42]	82 [37]	92 [42]	80 [36]	347 [157]



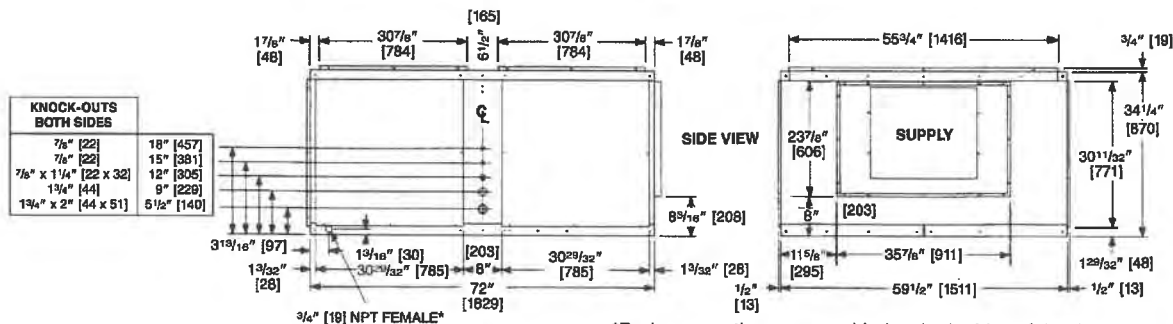
*Drain connections are provided on both sides of the drain pan. The drain can be connected to either side of the drain pan, but not both. The drain must be trapped.



15 AND 20 NOMINAL TONS [53 & 70 kW]

MODEL	REFRIGERANT STUB SIZES, IN. [mm]			
	DUAL LIQ.	DUAL SUC.	SINGLE LIQ.	SINGLE SUC.
180	1/2, 1/2 [13, 13]	1 1/8, 1 1/8 [29, 29]	5/8 [16]	1 5/8 [41]
240	5/8, 5/8 [16, 16]	1 3/8, 1 3/8 [35, 35]	7/8 [22]	1 5/8 [41]

MODEL	CORNER WEIGHTS, LBS. [kg]				TOTAL WEIGHT
	A	B	C	D	
180	144 [65]	127 [58]	117 [53]	105 [48]	495 [225]
240	159 [72]	142 [64]	129 [59]	115 [52]	545 [247]



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*Drain connections are provided on both sides of the drain pan. The drain can be connected to either side of the drain pan, but not both. The drain must be trapped.

PHYSICAL DATA/DRIVE PACKAGE DATA—RHGL- SERIES



ITEM		MODEL NO. RHGL-			
		090	120	180	240
Nominal Size tons [kW]		7.5 [26]	10 [35]	15 [53]	20 [70]
Nominal CFM [L/s] @ Rated E.S.P., in. [kPa] of water		3000 @ .25 [1416 @ .062]	3000 @ .25 [1416 @ .062] 4000 @ .30 [1888 @ .075]	6000 @ .35 [2832 @ .087]	8000 @ .40 [3776 @ .099]
MOTOR	Standard—3450 RPM [W] 1 Ø 1725 RPM [W] 3 Ø	1 HP [766] 1 HP [766]	2 HP [1491] 1½ HP [1119]	— 2 HP [1491]	— 5 HP [3729]
	Optional—1725 RPM [W] 3 Ø	1½ HP [1119]	2 HP, 3 HP [1491, 2237]	3 HP, 5 HP [2237, 3729]	7½ HP [5593]
Blower Size—diameter & width, in. [mm]		12 x 12 [305 x 305]	12 x 12 [305 x 305]	18 x 15 [457 x 381]	18 x 18 [457 x 457]
Blower Shaft Size (diameter) in. [mm]		¾ [19]	¾ [19]	1 [25]	1 [25]
Motor Sheave Size 3450 RPM 1 Ø Adjustment (std.) in. [mm] 1725 RPM 3		1.9-2.9 [48-74] 3.4-4.4 [86-112]	2.4-3.2 [61-81] 4.0-5.0 [102-127]	— 3.1-4.1 [79-104]	— 4.3-5.5 [109-140]
Coil Face Area, sq. feet [m²]		10.2 [.95]	10.2 [.95]	16.5 [1.53]	16.5 [1.53]
Coil Tube Diameter in. [mm]		¾ [10]	¾ [10]	¾ [10]	¾ [10]
Coil, Rows Deep—Fins Per Inch [mm]		3/15 [.51]	4/15 [.59]	3/15 [.51]	4/15 [.59]
Refrigerant Control—Thermal Expansion Valves (Quantity)		BBIZE-3-GA (2)	CBBIZE-5-GA (2)	BBIZE-6-GA (2)	BBIZE-8-GA (2)
Filter Size, in. [mm] (Number Required) Disposable*		16 x 25 x 1 (4) [406 x 635 x 25]	16 x 25 x 1 (4) [406 x 635 x 25]	20 x 25 x 1 (6) [508 x 635 x 25]	20 x 25 x 1 (6) [508 x 635 x 25]
CABINET:					
Finish		Powder Paint	Powder Paint	Powder Paint	Powder Paint
Sheet Metal		Galvanized	Galvanized	Galvanized	Galvanized
Gauge (nominal)					
Top		18	18	18	18
Sides		16	16	16	16
Bottom		18	18	16	16
Doors and Covers		20 min.	20 min.	20 min.	20 min.
UNIT WEIGHTS:					
Operating (lbs.) [kg]		330 [150]	347 [157]	495 [225]	545 [247]
Shipping (lbs.) [kg]		350 [159]	367 [166]	530 [240]	580 [263]
PACKAGED DIMENSIONS: (H x W x L) [mm]		31½" x 56" x 57¼" [800 x 1422 x 1454]	31½" x 56" x 57¼" [800 x 1422 x 1454]	39" x 63" x 76½" [991 x 1600 x 1943]	39" x 63" x 76½" [991 x 1600 x 1943]

*Unit will accept 2" [51 mm] filters.

NOTE: If a factory accessory heater kit is not used, a field supplied fan contactor is required and should have a 24 volt coil with contacts rated to handle the evaporator motor FLA at desired voltage. A factory supplied 30 Amp 3 Pole or 30 Amp 2 Pole contactor may be purchased from the Parts Department.

[] Designates Metric Conversions



PHYSICAL DATA/DRIVE PACKAGE DATA—RHGL- SERIES

NOMINAL TONS [kW]	DRIVE PACKAGE — BELT		SHEAVE SELECTIONS*, IN. [mm]		MOTOR HP [W]/PHASE	APPROX. BLOWER RPM @ MOTOR SHEAVE TURNS OPEN								
			MOTOR/BORE	BLOWER		0	1	2	2.5	3	4	5	6	
7.5 [26]	K	4L530	3.4-4.4-5/8	[86-112-16]	9.75 [248]	1 [746]/30	790	760	730	715	700	665	630	—
	K	4L480	1.9-2.9	[48-74]	9.75 [248]	1 [746]/10	1025	965	900	—	830	760	695	—
	L	4L530	4.2-5.2-5/8	[107-132-16]	9.75 [248]	1.5 [1119]/30	925	895	860	845	825	790	750	—
	M	4L550	5.2-6.2-5/8	[132-157-16]	9.75 [248]	1.5 [1119]/30	1125	1090	1055	—	1020	985	945	—
	◇N	4L550	5.7-6.7-7/8	[145-170-22]	9.75 [248]	2 [1491]/30	1195	1165	1130	—	1100	1065	1030	—
10 [35]	J+	4L530	3.4-4.4	[86-112]	9.75 [248]	1.5 [1119]/30	790	760	725	—	690	660	630	—
	K	4L530	4.0-5.0-5/8	[102-127-16]	9.75 [248]	1.5 [1119]/30	885	855	825	—	795	760	730	—
	K	4L480	1.9-2.9	[48-74]	8.75 [222]	2 [1491]/10	1140	1070	995	—	920	845	770	—
	L	4L540	4.6-5.6-7/8	[117-142-22]	9.75 [248]	2 [1491]/30	995	960	930	—	895	860	825	—
	M	4L550	5.2-6.2-7/8	[132-157-22]	9.75 [248]	3 [2237]/30	1125	1090	1055	—	1020	985	945	—
	△N	4L530	4.7-5.7-7/8	[119-145-22]	7.75 [197]	3 [2237]/30	1225	1190	1150	—	1110	1070	1030	—
	□O	4L540	5.7-6.7-7/8	[145-170-22]	8.75 [222]	3 [2237]/30	1280	1250	1220	—	1185	1150	1115	—
15 [53]	K	BP-52	3.1-4.1-7/8	[79-104-22]	11.4 [290]	2 [1491]/30	645	620	590	—	565	535	510	480
	L	BP-52	3.7-4.7-7/8	[94-119-22]	11.4 [290]	3 [2237]/30	730	705	680	—	655	630	600	570
	M	BP-45	3.7-4.7-11/8	[94-119-29]	9.4 [239]	5 [3729]/30	870	840	810	—	780	750	715	680
	#N	BP-50	4.8-6.0-11/8	[122-152-29]	10.4 [264]	5 [3729]/30	985	960	935	—	910	885	860	835
20 [70]	K	BP-50	4.3-5.5-11/8	[109-140-29]	11.4 [290]	5 [3729]/30	850	825	800	—	775	745	715	685
	L	BP-48(2)	4.3-5.5-13/8	[109-140-35]	10.4 [264]	7.5 [5593]/30	955	925	895	—	865	835	805	780
	M	BP-47(2)	4.3-5.5-13/8	[109-140-35]	9.4 [239]	7.5 [5593]/30	1030	995	960	—	925	890	855	815

*Actual pitch diameter in inches. Minimum and maximum pitch diameter shown for adjustable motor sheave. ◇ Field Supplied (Motor Sheave: Browning IVP75, Blower Sheave: Browning AZ100, Motor: 2HP [1491 W], 4 Pole, 30). △ Field Supplied (Motor Sheave: Browning IVP65, Blower Sheave: Browning AZ80). □ Field Supplied (Motor Sheave: Browning IVP75, Blower Sheave: Browning AZ90). # Field Supplied (Motor Sheave: Browning IVP65, Blower Sheave: Browning BK110). + Field Supplied (Motor Sheave: Browning IVP50, Blower Sheave: Browning AZ100). Factory sheave settings are shown in bold print. The K, L, and M drives are available from the factory. The J, N, and O drives are not available from the factory and these sheaves and belts must be field supplied. A motor change is not required. The field supplied sheaves and belts are standard shelf items that are readily available from local equipment supply houses. The chart above gives the necessary specifications for these field supplied sheaves and belts.

[] Designates Metric Conversions

AIRFLOW PERFORMANCE—RHGL- SERIES



INDOOR BLOWER PERFORMANCE (DRY COIL) RHGL-090 Z/Y

DRIVE PKG	STD CFM	E.S.P.—INCHES OF WATER [kPa]																																											
		.1 [0.02]		.2 [0.05]		.3 [0.07]		.4 [0.10]		.5 [0.12]		.6 [0.15]		.7 [0.17]		.8 [0.20]		.9 [0.22]		1.0 [0.25]		1.1 [0.27]		1.2 [0.30]		1.3 [0.32]		1.4 [0.35]		1.5 [0.37]		1.6 [0.40]		1.7 [0.42]		1.8 [0.45]		1.9 [0.47]		2.0 [0.50]					
		RPM	W	RPM	W	RPM	W	RPM	W	RPM	W	RPM	W	RPM	W	RPM	W	RPM	W	RPM	W	RPM	W	RPM	W	RPM	W	RPM	W	RPM	W	RPM	W	RPM	W	RPM	W	RPM	W	RPM	W				
K L M N	1800 [850 Us]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—			
	2000 [944 Us]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—		
	2200 [1038 Us]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—		
	2400 [1133 Us]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—		
	2600 [1227 Us]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—		
K L M N	2800 [1321 Us]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	3000 [1416 Us]	830	680	690	730	695	775	730	840	770	920	800	995	830	1060	860	1145	890	1220	935	1230	985	1285	995	1345	1020	1405	1050	1505	1080	1560	1110	1640	1115	1650	1140	1740	1170	1815	1195	1885	—	—	—	—
	3200 [1510 Us]	660	810	695	860	725	920	765	1000	795	1070	825	1140	855	1225	890	1315	920	1370	960	1385	985	1445	1015	1530	1040	1620	1070	1665	1085	1695	1115	1780	1135	1875	—	—	—	—	—	—	—	—		
	3400 [1605 Us]	690	940	725	1000	760	1090	790	1155	820	1225	850	1325	885	1410	915	1460	950	1485	980	1570	1010	1660	1030	1680	1045	1745	1075	1830	—	—	—	—	—	—	—	—	—	—	—	—	—			
	3600 [1699 Us]	720	1120	750	1185	790	1250	820	1315	850	1430	885	1520	915	1590	945	1605	975	1695	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—

K = IPV50, AZ100, 1 HP [766 W] L = IPV60, AZ100, 1 1/2 HP [1119 W] M = IPV68, AZ100, 2 HP [1491 W] N = IPV75, AZ100, 2 HP [1491 W] [Field Supplied]
NOTE: Bold lines separate K, L, M and N drives respectively.

RHGL-090 HK

DRIVE PKG	STD CFM	E.S.P.—INCHES OF WATER [kPa]																							
		.1 [0.02]	.2 [0.05]	.3 [0.07]	.4 [0.10]	.5 [0.12]	.6 [0.15]	.7 [0.17]	.8 [0.20]	.9 [0.22]	1.0 [0.25]	1.1 [0.27]	1.2 [0.30]	1.3 [0.32]	1.4 [0.35]	1.5 [0.37]	1.6 [0.40]	1.7 [0.42]	1.8 [0.45]	1.9 [0.47]	2.0 [0.50]				
		RPM T.O.	W	RPM T.O.	W	RPM T.O.	W	RPM T.O.	W	RPM T.O.	W	RPM T.O.	W	RPM T.O.	W	RPM T.O.	W	RPM T.O.	W	RPM T.O.	W	RPM T.O.	W	RPM T.O.	
	2200 [1038 L/s]																								
	2400 [1133 L/s]																								
	2600 [1227 L/s]																								
K	2800 [1321 L/s]																								
	3000 [1416 L/s]																								
	3200 [1510 L/s]																								
	3400 [1605 L/s]																								
	3600 [1699 L/s]																								

K = INP34, A2100, 1 HP [746 W] 1Ø

NOTES: T.O. = Turns Open

1. Standard air @ .075 lbs/ft³

2. Operation below heavy lines require optional drives.

3. Motor efficiency = .70

4. BHP = WATTS x MOTOR EFFICIENCY
746

5. BHP = Brake Horsepower
RPM = Blower Speed

K = IPV34, AZ100, 1 HP [746 W] 18
NOTES: T.O. = Turns Open
1. Standard air @ .075 lbs/ft³
2. Operation below heavy lines require optional drives.
3. Motor efficiency = .70
4. BHP = WATTS x MOTOR EFFICIENCY
746
5. BHP = Brake Horsepower
RPM = Blower Speed

[] Designates Metric Conversions



AIRFLOW PERFORMANCE—RHGL- SERIES

INDOOR BLOWER PERFORMANCE (DRY COIL) RHGL-120 HK

DRIVE PKG	STD CFM	E.S.P.—INCHES OF WATER [kPa]																							
		.1 [0.02]	.2 [0.05]	.3 [0.07]	.4 [0.10]	.5 [0.12]	.6 [0.15]	.7 [0.17]	.8 [0.20]	.9 [0.22]	1.0 [0.25]	1.1 [0.27]	1.2 [0.30]	1.3 [0.32]	1.4 [0.35]	1.5 [0.37]	1.6 [0.40]	1.7 [0.42]	1.8 [0.45]	1.9 [0.47]	2.0 [0.50]				
		RPM T.O.	RPM W	RPM T.O.	RPM W	RPM T.O.	RPM W	RPM T.O.	RPM W	RPM T.O.	RPM W	RPM T.O.	RPM W	RPM T.O.	RPM W	RPM T.O.	RPM W	RPM T.O.	RPM W	RPM T.O.	RPM W	RPM T.O.			
	3000 [1416 L/s]					760 4.4	1200 4.4	850 2.8	1280 3.5	950 2.6	1350 2.8	1000 2.8	1545 2.8	1035 2.8	1670 2.8	1080 2.8	1870 2.8	1120 2.8	1960 2.8						
	3200 [1510 L/s]					820 4.4	1270 4.4	910 2.8	1440 3.5	980 2.8	1520 2.8	1030 2.8	1730 2.8	1060 2.8	1820 2.8	1080 2.8	2030 2.8	1115 2.8	2130 2.8						
	3400 [1605 L/s]					840 4.4	1330 4.4	945 2.8	1595 3.5	970 2.8	1705 2.8	1080 2.8	1880 2.8	1095 2.8	1955 2.8	1110 2.8	2190 2.8	1235 2.8							
	3600 [1699 L/s]					860 4.4	1390 4.4	960 2.8	1655 3.5	990 2.8	1780 2.8	1100 2.8	1900 2.8	1120 2.8	2040 2.8	1140 2.8	2220 2.8								
	3800 [1793 L/s]					880 4.4	1450 4.4	980 2.8	1715 3.5	1000 2.8	1830 2.8	1120 2.8	1940 2.8	1140 2.8	2060 2.8	1160 2.8	2240 2.8								
	4000 [1888 L/s]					900 4.4	1510 4.4	1000 2.8	1775 3.5	1020 2.8	1890 2.8	1140 2.8	1960 2.8	1160 2.8	2080 2.8	1180 2.8	2260 2.8								
	4200 [1982 L/s]					920 4.4	1570 4.4	1020 2.8	1835 3.5	1040 2.8	1950 2.8	1160 2.8	1980 2.8	1180 2.8	2100 2.8	1200 2.8	2280 2.8								
	4400 [2077 L/s]					940 4.4	1630 4.4	1040 2.8	1895 3.5	1060 2.8	2005 2.8	1180 2.8	2030 2.8	1200 2.8	2120 2.8	1220 2.8	2300 2.8								
	4600 [2171 L/s]					960 4.4	1690 4.4	1060 2.8	1955 3.5	1080 2.8	2065 2.8	1200 2.8	2090 2.8	1220 2.8	2140 2.8	1240 2.8	2320 2.8								
	4800 [2265 L/s]					980 4.4	1750 4.4	1080 2.8	2015 3.5	1100 2.8	2125 2.8	1220 2.8	2155 2.8	1240 2.8	2170 2.8	1260 2.8	2340 2.8								

K

K = IVP34, AZ50, 2 HP 1491 W/ 10

NOTES: T.O. = Turns Open

1. Standard air @ .075 lbs/ft³

2. Operation below heavy lines require optional drives.

3. Motor efficiency = .70

4. BHP = WATTS x MOTOR EFFICIENCY

746

5. BHP = Brake Horsepower

RPM = Blower Speed

K = IVP34, AZ90, 2 HP [1491 W] 10
 NOTES: T.O. = Turns Open
 1. Standard air @ .075 lbs/ft³
 2. Operation below heavy lines require optional drives.
 3. Motor efficiency = .70
 4. BHP = WATTS x MOTOR EFFICIENCY
 746
 5. BHP = Brake Horsepower
 RPM = Blower Speed

RHGL-120 Z/Y

DRIVE PKG	STD CFM	E.S.P.—INCHES OF WATER [kPa]																																									
		.1 [0.02]	.2 [0.05]	.3 [0.07]	.4 [0.10]	.5 [0.12]	.6 [0.15]	.7 [0.17]	.8 [0.20]	.9 [0.22]	1.0 [0.25]	1.1 [0.27]	1.2 [0.30]	1.3 [0.32]	1.4 [0.35]	1.5 [0.37]	1.6 [0.40]	1.7 [0.42]	1.8 [0.45]	1.9 [0.47]	2.0 [0.50]																						
		RPM	W	RPM	W	RPM	W	RPM	W	RPM	W	RPM	W	RPM	W	RPM	W	RPM	W	RPM	W	RPM	W																				
	2400 [1133 US]	—	—	—	650	510	690	570	720	610	760	670	790	755	815	805	845	860	875	940	920	1125	955	1110	990	1200	1000	1320	1040	1350	1080	1490	1100	1630	1130	1670	1150	1700					
	2600 [1227 US]	—	—	—	635	545	675	620	715	665	750	720	780	795	810	860	830	910	860	990	890	1070	930	1150	960	1230	995	1310	1020	1400	1060	1460	1100	1510	1120	1680	1140	1730	1160	1790			
	2800 [1321 US]	—	—	630	595	665	705	720	740	775	775	790	805	825	840	855	1075	885	1165	915	1210	950	1285	980	1370	1000	1450	1040	1530	1080	1590	1120	1650	1130	1720	1150	1800	1175	1880				
	3000 [1416 US]	630	660	660	730	695	775	730	880	755	940	790	1005	825	1065	855	1130	885	1190	920	1290	955	1380	980	1245	1010	1300	1035	1620	1065	1690	1100	1750	1110	1800	1400	1920	1185	1980				
	3200 [1510 US]	660	810	685	860	730	950	750	1005	785	1080	815	1150	850	1225	880	1285	910	1390	950	1470	975	1540	1010	1620	1030	1740	1065	1820	1095	1880	1095	1890	1125	1995	1155	2045	1175	2090	1190	2160		
	3400 [1605 US]	690	940	725	1000	745	1090	780	1160	810	1240	845	1320	875	1390	910	1500	945	1590	970	1650	995	1725	1025	1860	1055	1940	1055	1900	1080	1975	1110	2095	1140	2185	1165	2245	1180	2270	1200	2315		
	3600 [1699 US]	730	1100	745	1175	780	1250	810	1340	845	1435	875	1510	905	1620	945	1715	960	1780	990	1855	1020	1995	1050	2080	1080	2160	1080	2160	1165	1105	2225	1135	2325	1155	2400	1175	2460	1195	2510	1220	2575	
	3800 [1793 US]	745	1265	780	1350	810	1455	840	1550	875	1630	905	1740	940	1840	955	1905	990	2050	1025	2145	1045	2225	1075	2315	1075	2270	1100	2390	1130	2495	1150	2590	1170	2650	1190	2710	1220	2770	1265	2895		
	4000 [1888 US]	780	1465	810	1575	850	1690	890	1780	910	1880	940	2010	970	2110	990	2180	1020	2300	1050	2400	1075	2490	1075	2590	1100	2680	1100	2795	1130	2890	1145	2795	1170	2855	1185	2920	1215	2985	1260	3090	1275	3165
	4200 [1982 US]	825	1750	855	1840	885	1925	920	2060	940	2180	965	2260	995	2365	1025	2470	1050	2560	1080	2680	1080	2685	1100	2795	1130	2890	1150	3000	1165	3090	1190	3145	—	—	—	—	—	—	—			
	4400 [2077 US]	845	1925	905	2100	925	2195	950	2320	970	2430	995	2550	1030	2650	1050	2755	1055	2760	1085	2855	1100	2985	1130	3115	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—		
	4600 [2171 US]	915	2225	930	2375	955	2495	980	2620	1010	2750	1030	2840	1035	2950	1055	2960	1060	3070	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—		
	4800 [2265 US]	930	2555	960	2680	985	2810	1015	2940	1035	3040	1035	3045	1055	3180	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—		
	5000 [2360 US]	960	2870	990	3010	1020	3135	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—		

J = IVP50, AZ100, 1 1/2 HP [1119 W] [Field Supplied]
 K = IVP56, AZ100, 1 1/2 HP [1119 W]
 L = IVP62, AZ100, 2 HP [1491 W]
 M = IVP68, AZ100, 3 HP [2237 W]
 N = IVP65, AZ80, 3 HP [2237 W] [Field Supplied]
 O = IVP75, AZ90, 3 HP [2237 W] [Field Supplied]
 NOTE: Bold lines separate J, K, L, M, N and O drives respectively.

[] Designates Metric Conversions



INDOOR BLOWER PERFORMANCE RHGG-15 TON [53 kW] & 20 TON [70 kW] (DRY COIL) RHGL-180 Z/Y

DRIVE PKG	STD CFM	E.S.P.—INCHES OF WATER [kPa]																			
		.1 [0.02]	.2 [0.05]	.3 [0.07]	.4 [0.10]	.5 [0.12]	.6 [0.15]	.7 [0.17]	.8 [0.20]	.9 [0.22]	1.0 [0.25]	1.1 [0.27]	1.2 [0.30]	1.3 [0.32]	1.4 [0.35]	1.5 [0.37]	1.6 [0.40]	1.7 [0.42]	1.8 [0.45]	1.9 [0.47]	2.0 [0.50]
K	4000 [1988 L/s]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	4400 [2077 L/s]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	4800 [2265 L/s]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	5200 [2454 L/s]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
L	5600 [2643 L/s]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	6000 [2832 L/s]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	6400 [3020 L/s]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	6800 [3209 L/s]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
M-N	7200 [3398 L/s]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	7600 [3587 L/s]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	8000 [3776 L/s]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	8400 [3965 L/s]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—

K = 1VP44, BK120, 2 HP [1491 W]
 L = 1VP50, BK120, 3 HP [2237 W]
 M = 1VP50, BK100, 5 HP [3729 W]
 N = 1VP65, BK110, 5 HP [3729 W] [Field Supplied]
 NOTE: Bold lines separate K, L, M and N drives respectively.

RHGL-240 Z/Y

DRIVE PKG	STD CFM	E.S.P.—INCHES OF WATER [kPa]																			
		.1 [0.02]	.2 [0.05]	.3 [0.07]	.4 [0.10]	.5 [0.12]	.6 [0.15]	.7 [0.17]	.8 [0.20]	.9 [0.22]	1.0 [0.25]	1.1 [0.27]	1.2 [0.30]	1.3 [0.32]	1.4 [0.35]	1.5 [0.37]	1.6 [0.40]	1.7 [0.42]	1.8 [0.45]	1.9 [0.47]	2.0 [0.50]
K	6000 [2832 L/s]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	6500 [3068 L/s]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	7000 [3304 L/s]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	7500 [3540 L/s]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
L-M	8000 [3776 L/s]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	8500 [4012 L/s]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	9000 [4248 L/s]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	9500 [4484 L/s]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	10000 [4719 L/s]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	10500 [4955 L/s]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	11000 [5191 L/s]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	11500 [5427 L/s]	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—

K = 1VP60, BK120, 5 HP [3729 W]
 L = 2VP60, 2BK110, 7½ HP [5593 W]
 M = 2VP60, 2BK100, 7½ HP [5593 W]
 NOTE: 1. Bold lines separate K, L and M drives respectively.
 2. Standard air @ .075 lbs/ft³ [m³]
 3. Operation below heavy lines require optional drives.
 4. Motor efficiency = .85
 5. BHP = WATTS x MOTOR EFFICIENCY
 746
 6. BHP = Brake Horsepower
 RPM = Blower Speed

[] Designates Metric Conversions



AIRFLOW PERFORMANCE—RHGL- SERIES

COMPONENT AIR RESISTANCE

RHGL 7.5 TON [26 kW] & 10 TON [35 kW]

CFM [L/s]	1800 [850]	2200 [1038]	2600 [1227]	3000 [1416]	3400 [1605]	3800 [1793]	4200 [1982]	4600 [2171]	5000 [2360]
Electric Heater 20KW, 30KW	.060 [.015]	.100 [.025]	.140 [.034]	.160 [.040]	.230 [.057]	.320 [.080]	.410 [.102]	.500 [.124]	.600 [.150]
Mixing Box (R/A Damper Open)	.006 [.001]	.008 [.002]	.012 [.003]	.024 [.006]	.038 [.009]	.053 [.013]	.068 [.017]	.080 [.020]	.095 [.024]
Discharge Grille (Set Max. Open)	.008 [.002]	.011 [.003]	.015 [.004]	.020 [.005]	.025 [.006]	.031 [.008]	.039 [.010]	.046 [.012]	.055 [.014]
Inlet Grille	.008 [.002]	.010 [.002]	.014 [.003]	.020 [.005]	.026 [.006]	.032 [.008]	.039 [.010]	.049 [.012]	.058 [.014]
Discharge Plenum	.02 [.005]	.04 [.010]	.05 [.012]	.065 [.016]	.085 [.021]	.100 [.025]	.120 [.030]	.150 [.037]	.180 [.045]

RHGL 15 TON [53 kW]

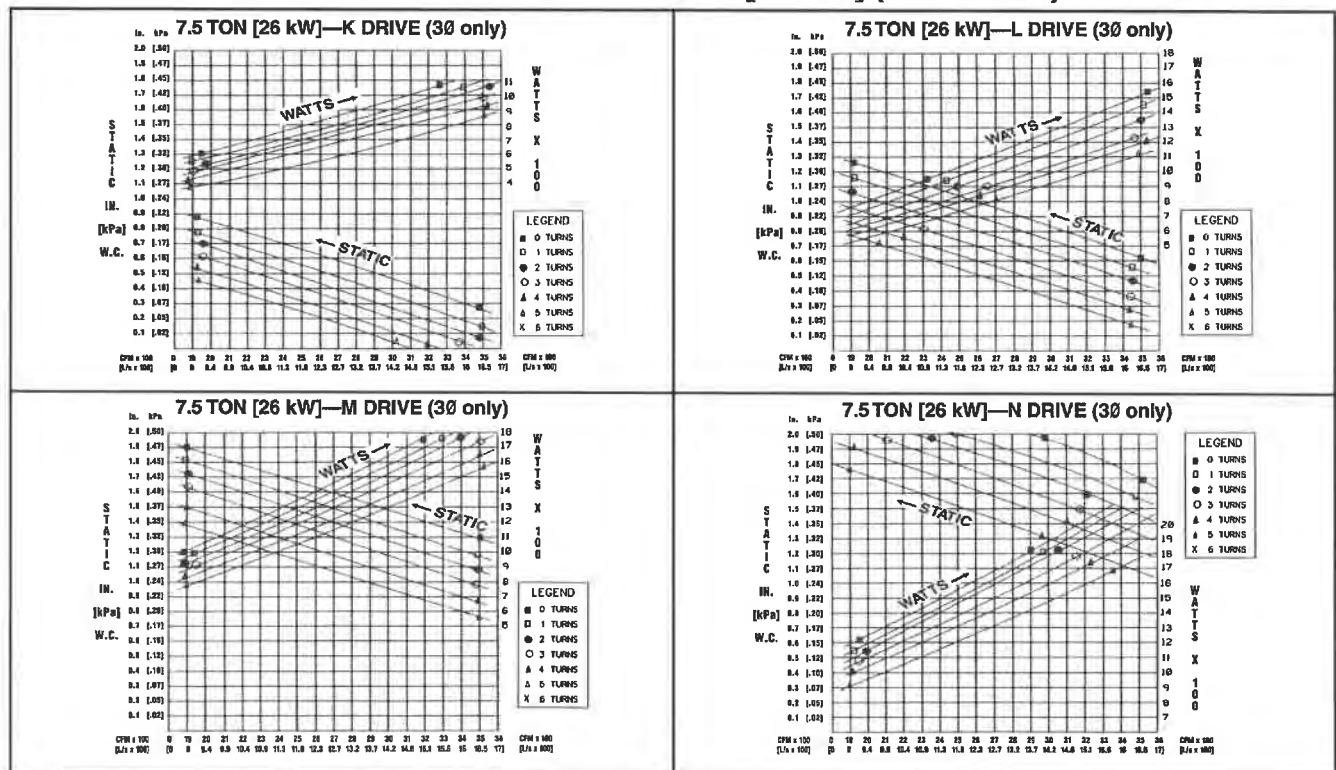
CFM [L/s]	4000 [1888]	4400 [2077]	4800 [2265]	5200 [2454]	5600 [2643]	6000 [2832]	6400 [3020]	6800 [3209]	7200 [3398]
Electric Heater 30KW	.175 [.040]	.187 [.050]	.200 [.049]	.215 [.053]	.230 [.057]	.250 [.062]	.275 [.068]	.305 [.076]	.350 [.087]
Electric Heater 40KW	.290 [.070]	.320 [.080]	.350 [.087]	.380 [.095]	.410 [.102]	.450 [.112]	.495 [.123]	.550 [.137]	.600 [.149]
Mixing Box (R/A Damper Open)	.030 [.007]	.037 [.009]	.044 [.011]	.052 [.013]	.061 [.015]	.071 [.018]	.091 [.023]	.102 [.025]	.110 [.027]
Discharge Grille (Set Max. Open)	.010 [.003]	.012 [.003]	.014 [.004]	.017 [.004]	.019 [.005]	.022 [.006]	.025 [.006]	.029 [.007]	.032 [.008]
Inlet Grille	.010 [.002]	.014 [.003]	.020 [.005]	.027 [.007]	.035 [.009]	.044 [.011]	.054 [.013]	.065 [.016]	.077 [.019]
Discharge Plenum	.02 [.005]	.04 [.010]	.05 [.012]	.065 [.012]	.085 [.021]	.100 [.025]	.120 [.030]	.150 [.037]	.180 [.045]

RHGL 20 TON [70 kW]

CFM [L/s]	6400 [3020]	6800 [3209]	7200 [3398]	7600 [3586]	8000 [3776]	8400 [3964]	8800 [4153]	9200 [4342]	9600 [4531]
Electric Heater 30KW	.220 [.055]	.230 [.057]	.240 [.060]	.260 [.065]	.280 [.070]	.300 [.075]	.320 [.080]	.340 [.085]	.370 [.092]
Electric Heater 40KW	.360 [.090]	.390 [.097]	.420 [.104]	.450 [.112]	.490 [.122]	.530 [.132]	.570 [.142]	.610 [.152]	.650 [.162]
Mixing Box (R/A Damper Open)	.095 [.023]	.102 [.025]	.110 [.027]	.115 [.030]	.121 [.030]	.126 [.031]	.128 [.032]	.135 [.034]	.142 [.035]
Discharge Grille (Set Max. Open)	.025 [.006]	.029 [.007]	.032 [.008]	.036 [.009]	.040 [.010]	.044 [.011]	.048 [.012]	.053 [.013]	.057 [.014]
Inlet Grille	.054 [.013]	.065 [.016]	.077 [.019]	.090 [.022]	.104 [.026]	.120 [.030]	.150 [.037]	.190 [.047]	.240 [.060]
Discharge Plenum	.120 [.030]	.150 [.037]	.180 [.045]	.210 [.052]	.250 [.062]	.290 [.072]	.340 [.085]	.400 [.101]	.470 [.117]

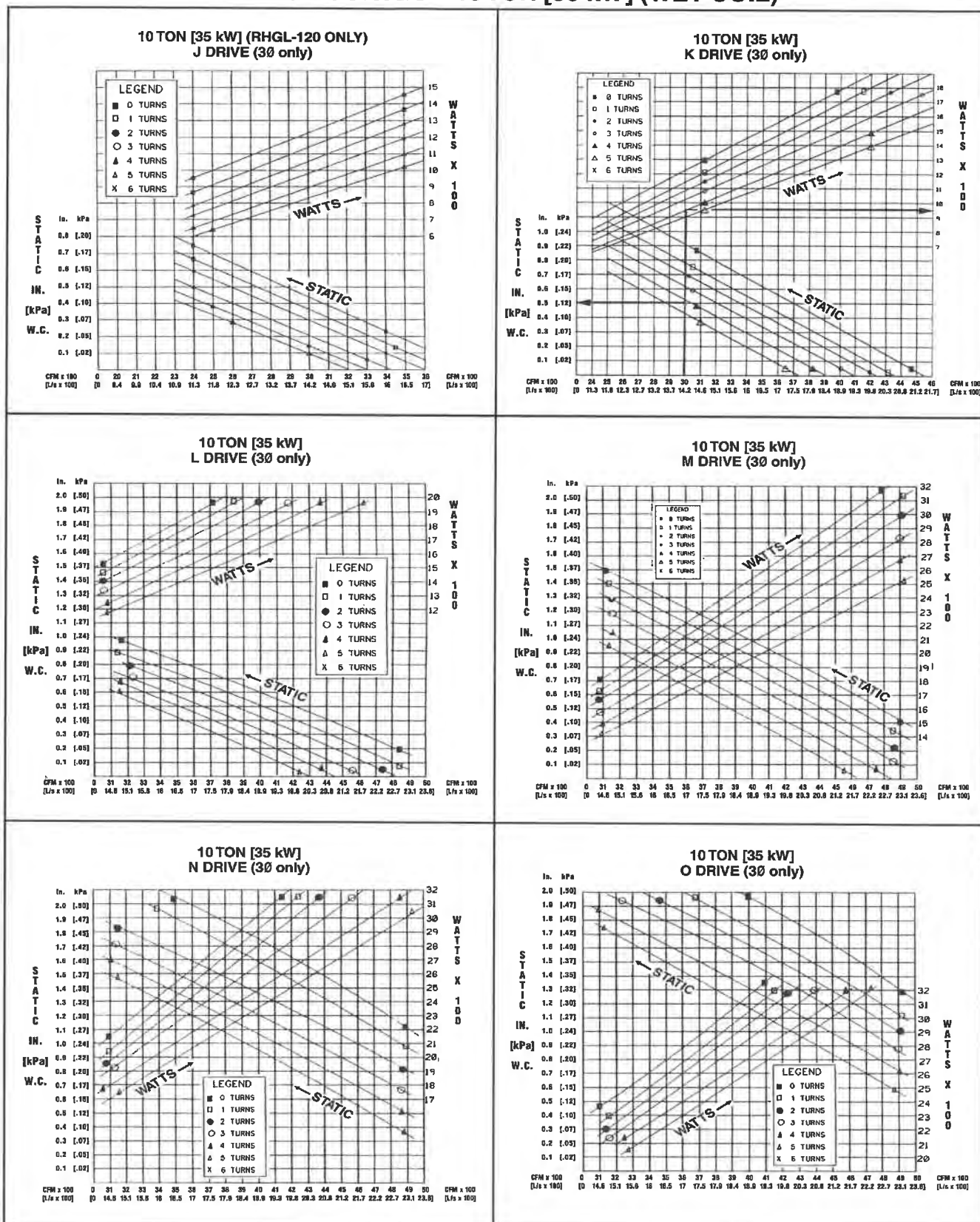
NOTE: Add component resistance to duct resistance to determine total E.S.P.

BLOWER PERFORMANCE CURVES—7.5 TON [26 kW] (WET COIL)



[] Designates Metric Conversions

BLOWER PERFORMANCE CURVES—10 TON [35 kW] (WET COIL)



[] Designates Metric Conversions



PERFORMANCE DATA—RHGL- SERIES

EVAPORATOR PERFORMANCE DATA (GROSS CAPACITY)

EVAPORATOR/AIR HANDLER RHGL-090 @ 3000 CFM [1416 L/s] 105°F (40.8°C) LIQUID TEMPERATURE AT TXV													
AIRFLOW	EVAP. TEMP	75/63°F				80/67°F				55/71°F			
		TC	SC	LDB °F	LWB °F	TC	SC	LDB °F	LWB °F	TC	SC	LDB °F	LWB °F
3000	40	101,593	73,674	52.9	51.0	127,358	84,666	63.8	51.9	153,992	94,880	54.9	53.1
	45	80,928	62,952	57.3	54.8	103,594	73,170	58.8	56.3	130,995	83,959	59.4	57.3
	50	59,031	52,456	61.6	66.7	80,997	82,400	63.0	50.2	105,321	72,678	64.1	61.6

EVAPORATOR/AIR HANDLER RHGL-120 @ 3800 CFM [1793 L/s] 105°F (40.6°C) LIQUID TEMPERATURE AT TXV													
AIRFLOW	EVAP. TEMP	75/63°F				80/67°F				85/71°F			
		TC	SC	LDB °F	LWB °F	TC	SC	LDB °F	LWB °F	TC	SC	LDB °F	LWB °F
3800	40	154,071	108,420	49.6	48.2	190,237	123,295	50.5	48.1	189,959	10,8803	60.4	58.6
	45	121,745	92,384	54.1	52.3	157,209	107,660	66.0	53.4	196,257	122,470	55.9	54.3
	50	88,849	77,108	58.5	56.3	122,773	91,908	59.5	57.5	159,969	108,803	60.4	56.6

EVAPORATOR/AIR HANDLER RHGL-180 @ 6000 CFM [2832 L/s] 105°F (40.6°C) LIQUID TEMPERATURE AT TXV													
AIRFLOW	EVAP. TEMP	75/63°F				80/67°F				85/71°F			
		TC	SC	LDB °F	LWB °F	TC	SC	LDB °F	LWB °F	TC	SC	LDB °F	LWB °F
6000	40	189,115	142,220	53.1	51.7	235,654	162,761	54.9	53.7	286,314	182,615	56.8	55.6
	45	149,290	121,287	56.3	54.3	192,102	141,102	58.2	56.4	240,876	161,094	60.1	58.4
	50	109,437	102,323	59.2	56.7	149,227	120,400	61.4	59.0	194,559	139,871	63.4	61.0

EVAPORATOR/AIR HANDLER RHGL-240 @ 8000 CFM [3776 L/s] 105°F (40.6°C) LIQUID TEMPERATURE AT TXV													
AIRFLOW	EVAP. TEMP	75/63°F				80/67°F				85/71°F			
		TC	SC	LDB °F	LWB °F	TC	SC	LDB °F	LWB °F	TC	SC	LDB °F	LWB °F
8000	40	254,328	189,910	53.0	51.6	315,853	187,796	58.3	53.6	378,360	240,448	57.2	55.7
	45	200,864	162,132	56.2	54.2	256,712	216,298	55.0	56.4	324,947	214,800	60.1	58.2
	50	148,684	136,787	59.2	56.6	202,098	162,261	61.2	58.9	260,278	186,284	63.4	61.0

NOTES: 1. Total and sensible capacity is gross with no deduction for indoor blower motor heat. 2. Interpolation is permissible. Do not extrapolate.
 3. Capacities are based on 105°F (40.6°C) liquid temperature at the TXV or about 95°F (35°C) dry bulb outdoor ambient.
 TC = Total Capacity, BTUH LDB = Leaving Air Dry Bulb
 SC = Sensible Capacity, BTUH LWB = Leaving Air Wet Bulb

[] Designates Metric Conversions



AIRFLOW CORRECTION FACTORS

RHGL-090 @ 3000 CFM [1416 L/s]							
ACTUAL—CFM [L/s]	2400 [1133]	2600 [1227]	2800 [1321]	3000 [1416]	3200 [1510]	3400 [1605]	3600 [1699]
TOTAL MBH	0.85	0.90	0.95	1.00	1.04	1.09	1.13
SENSIBLE MBH	0.83	0.88	0.94	1.00	1.06	1.11	1.16

NOTES: 1. Multiply correction factor times gross performance data.
2. Resulting sensible capacity cannot exceed total capacity.

RHGL-120 @ 3800 CFM [1793 L/s]													
ACTUAL—CFM [L/s]	2400 [1133]	2600 [1227]	2800 [1321]	3000 [1416]	3200 [1510]	3400 [1605]	3600 [1699]	3800 [1793]	4000 [1888]	4200 [1982]	4400 [2077]	4600 [2171]	4800 [2265]
TOTAL MBH	0.76	0.79	0.82	0.85	0.89	0.93	0.97	1.00	1.03	1.06	1.10	1.12	1.15
SENSIBLE MBH	0.68	0.73	0.78	0.82	0.87	0.91	0.96	1.00	1.04	1.08	1.13	1.17	1.21

NOTES: 1. Multiply correction factor times gross performance data.
2. Resulting sensible capacity cannot exceed total capacity.

RHGL-180 @ 6000 CFM [2832 L/s]										RHGL-240 @ 8000 CFM [3776 L/s]									
ACTUAL—CFM [L/s]	4400 [2077]	4800 [2265]	5200 [2454]	5600 [2643]	6000 [2832]	6400 [3020]	6800 [3209]	7200 [3398]	7600 [3587]	6400 [3020]	6800 [3209]	7200 [3398]	7600 [3587]	8000 [3776]	8400 [3964]	8800 [4153]	9200 [4342]	9600 [4531]	
TOTAL MBH	0.83	0.88	0.92	0.96	1.00	1.04	1.07	1.10	1.13	0.88	0.91	0.94	0.97	1.00	1.03	1.05	1.07	1.09	
SENSIBLE MBH	0.78	0.84	0.89	0.95	1.00	1.05	1.10	1.15	1.20	0.84	0.88	0.92	0.96	1.00	1.04	1.08	1.11	1.15	

NOTES: 1. Multiply correction factor times gross performance data.
2. Resulting sensible capacity cannot exceed total capacity.

[] Designates Metric Conversions



PERFORMANCE DATA/ELECTRIC HEATER KITS—RHGL- SERIES

PERFORMANCE DATA @ AHRI STANDARD CONDITIONS—COOLING

Dual Condensing Unit with Air Handler

OUTDOOR UNIT & AIR HANDLER	NET TOTAL	NET SENSIBLE	NET LATENT	EER	INDOOR AIRFLOW, CFM	A/H WATTS	TOTAL WATTS	DO WATTS	COMP WATTS	FAN WATTS
	BTU/H [kW]	BTU/H [kW]	BTU/H [kW]							
RANL-036 +RHGL-090	76,000 [22.27]	55,000 [16.12]	21,000 [6.18]	11.60	2,400 [1133]	510	8,552	6,042	5,512	530
RANL-048 +RHGL-090	94,000 [27.54]	71,000 [20.80]	23,000 [6.74]	11.60	3,200 [1510]	1,000	8,103	7,103	6,643	460
RANL-048 +RHGL-120	97,000 [28.42]	74,000 [21.66]	23,000 [6.74]	11.90	3,200 [1510]	1,000	8,151	7,145	8,885	460
RAPL-060JA +RHGL-120	110,000 [33.99]	86,000 [25.20]	30,000 [8.79]	11.20	4,000 [1888]	1,780	10,357	8,577	8,117	460

ELECTRIC HEATER KIT CHARACTERISTICS

AIR HANDLER MODEL	HEATER KIT MODEL	HEATER KIT VOLTAGE	HEATER KIT [kW]	HEATER KIT AMPS	HEATING CAPACITY [kW]	HEATING CAPACITY MBH	MINIMUM CIRCUIT AMPACITY	MAX. FUSE OR HACR BREAKER SIZE
RHGL-090 / RHGL-120	RXHE-DE020CA	208/240	20	43.1/48.9	15.6/20.2	53.2/68.9	67/73	70/80
RHGL-090 / RHGL-120	RXHE-DE030CA	208/240	30	60.8/70.2	22.0/29.6	75.1/101	89/100	90/100
RHGL-090 / RHGL-120	RXHE-DE020DA	480	20	24.7	20.2	68.9	37	40
RHGL-090 / RHGL-120	RXHE-DE030DA	480	30	35	29.7	101.3	50	50
RHGL-180 / RHGL-240	RXHE-CE030CC	208/240	30	60/70	21.6/28.8	73.7/98.3	105/115	110/125
RHGL-180 / RHGL-240	RXHE-CE040CC	208/240	40	83/96	30/40	102.4/136.5	134/148	150/150
RHGL-180 / RHGL-240	RXHE-CE030DC	480	30	35	28.8	98.3	58	60
RHGL-180 / RHGL-240	RXHE-CE040DC	480	40	48	40	136.5	74	80

NOTE: All kits have two stages of capacity, first stage heating is 50% of total capacity.

ELECTRICAL DATA TABLE

AIR HANDLER MOTOR			RATING PLATE AMPS	MOTOR LRA	MINIMUM CIRCUIT AMPACITY	RECOMMENDED MINIMUM Cu WIRE SIZE (3% VOLTAGE 75°C DROP) MAX. RUN IN FEET	MAX. FUSES BREAKERS
HP [W]	VOLTS	PHASE					
1 [746]	208-230	3Ø	4.0/3.6	23.9/21.6	15	#14/240	15
1 [746]	460	3Ø	1.8	10.8	15	#14/400	15
1 [746]	575	3Ø	1.4	8.4	15	#14/425	15
1 [746]	115-230	1Ø	16/8	96/48	20/15	#12/120 #14/180	20/15
1½ [1119]	208-230	3Ø	5.7/5.2	34.5/31.2	15	#14/230	15
1½ [1119]	460	3Ø	2.6	15.6	15	#14/300	15
1½ [1119]	575	3Ø	2.1	12.6	15	#14/325	15
2 [1491]	208-230	3Ø	7.5/6.8	45.1/40.8	15	#14/165	15
2 [1491]	460	3Ø	3.4	20.4	15	#14/275	15
2 [1491]	575	3Ø	2.7	16.2	15	#14/300	15
2 [1491]	115-230	1Ø	24/12	144/72	30/15	#10/140 #14/120	30/15
3 [2237]	208-230	3Ø	10.6/9.6	64.1/58	15	#14/135	15
3 [2237]	460	3Ø	4.8	26.8	15	#14/230	15
3 [2237]	575	3Ø	3.9	23.4	15	#14/240	15
5 [3729]	208-230	3Ø	16.7/15.2	100.6/91	21/19	#10/240 #12/150	25/20
5 [3729]	460	3Ø	7.6	45.6	15	#14/185	15
5 [3729]	575	3Ø	6.1	36.6	15	#14/220	15
7½ [5593]	208-230	3Ø	24.2/22.0	146/132	30/28	#10/150	30/30
7½ [5593]	460	3Ø	11.0	66	15	#14/135	15
7½ [5593]	575	3Ø	9.0	54	15	#14/150	15

NOTE: N.E.C., C.E.C. and local codes take precedence over suggested wire and fuse sizes.

[] Designates Metric Conversions

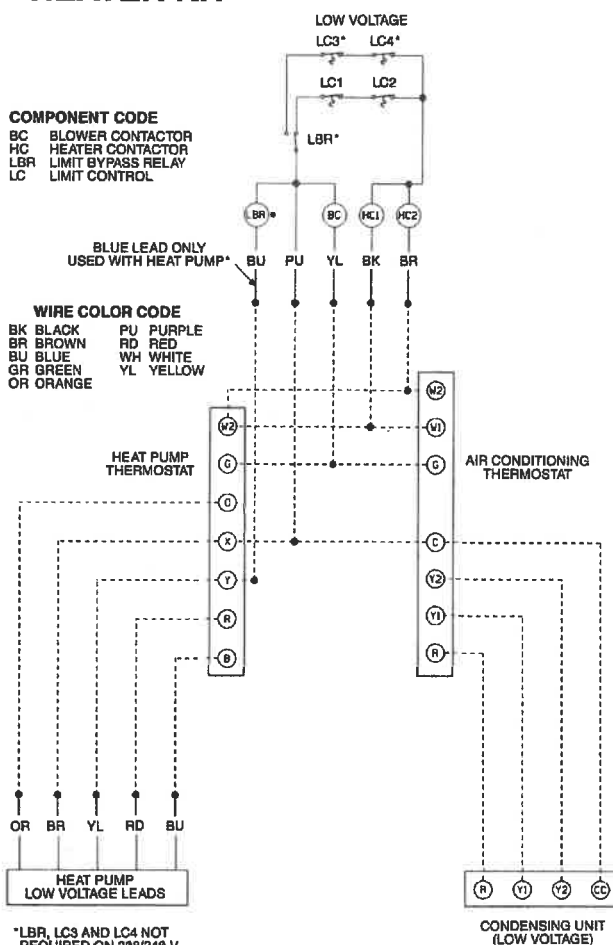
OPTIONAL HEATER KIT

COMPONENT CODE

BC BLOWER CONTACTOR
HC HEATER CONTACTOR
LBR LIMIT BYPASS RELAY
LC LIMIT CONTROL

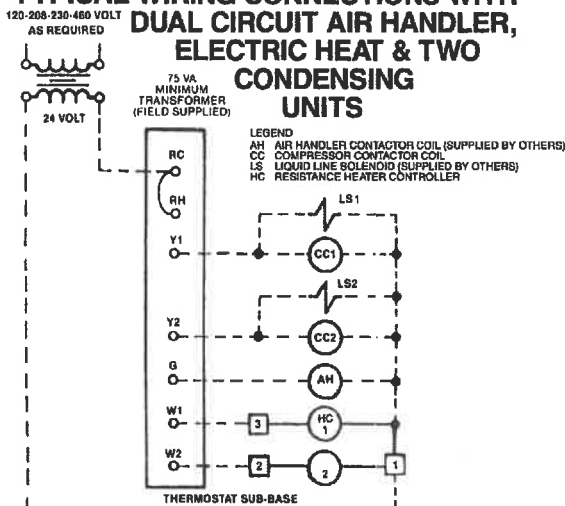
WIRE COLOR CODE

BK BLACK PU PURPLE
BR BROWN RD RED
BU BLUE WH WHITE
GR GREEN YL YELLOW
OR ORANGE

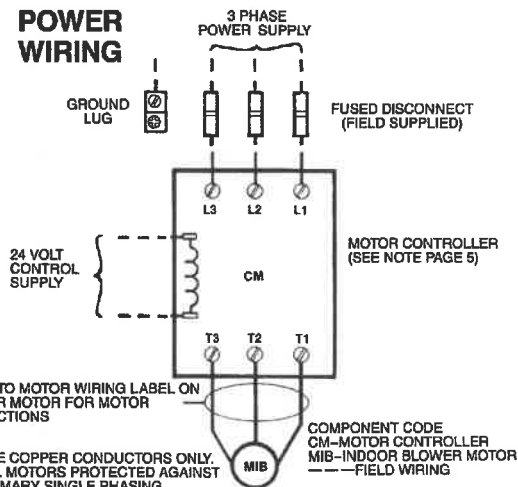


*LBR, LC3 and LC4 NOT REQUIRED ON 208/240 V KITS RATED 20KW & 30KW OR KITS INSTALLED ON 15 TON OR 20 TON AIR HANDLERS

TYPICAL WIRING CONNECTIONS WITH DUAL CIRCUIT AIR HANDLER, ELECTRIC HEAT & TWO CONDENSING UNITS



POWER WIRING



NOTE:
1. USE COPPER CONDUCTORS ONLY.
2. ALL MOTORS PROTECTED AGAINST PRIMARY SINGLE PHASING.

COMPONENT CODE
CM—MOTOR CONTROLLER
MIB—INDOOR BLOWER MOTOR
---FIELD WIRING



AIR HANDLER ACCESSORIES

ACCESSORY DESCRIPTION	MODEL NUMBER	SIZES USED ON	NET WEIGHT (LBS) [kg]
Hot Water Coil	RXHC-C74W	090, 120	200 [91]
	RXHC-C76W	180, 240	200 [91]
Steam Coil	RXHC-C74S	090, 120	200 [91]
	RXHC-C76S	180, 240	200 [91]
Filter Frame Kit	RXHF-B74A	090, 120	90 [41]
	RXHF-B76A	180, 240	117 [53]
Inlet Grille Kit	RXHG-C74A	090, 120	9 [4]
	RXHG-C76A	180, 240	12 [5]
Discharge Grille Kit	RXHG-C74B	090, 120	15 [7]
	RXHG-C76B	180, 240	23 [10]
Discharge Plenum Kit	RXHL-C74B	090, 120	38 [17]
	RXHL-C76B	180, 240	62 [28]
Mixing Box	RXHM-BC74H	090, 120	120 [54]
	RXHM-BC76H	180, 240	195 [88]
Auxiliary Heater Kit	RXHE-DE020*A	090, 120	75 [34]
	RXHE-DE030*A	090, 120	75 [34]
	RXHE-CE030*C	180, 240	90 [41]
	RXHE-CE040*C	180, 240	98 [44]

NOTE: *Designates "C", "D" or "Y" Voltage

[] Designates Metric Conversions

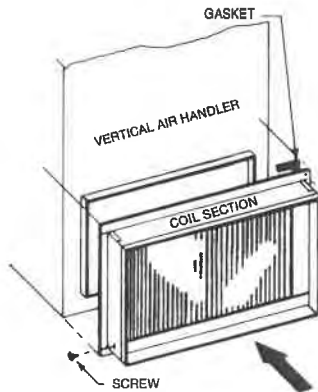
RXHM MIXING BOX



RXHE ELECTRIC HEATER KIT

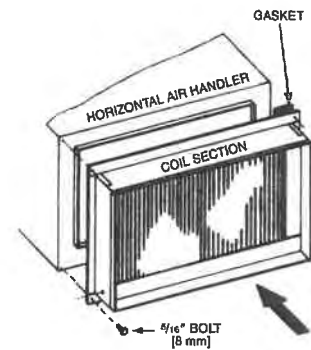


HOT WATER OR STEAM COILS



(090, 120) RXHC-C74W
RXHC-C74S
or
(180, 240) RXHC-C76W
RXHC-C76S

(090, 120) RXHC-C74W
RXHC-C74S
or
(180, 240) RXHC-C76W
RXHC-C76S



AIR HANDLER ACCESSORIES (con't)

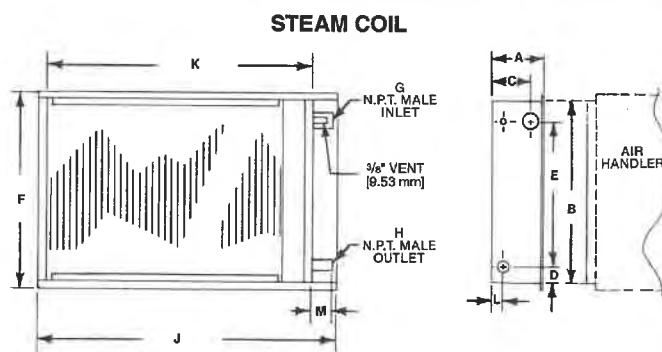
PHYSICAL SPECIFICATIONS

NOMINAL TONS [kW]	FINNED HEIGHT— IN. [mm]	FINNED LENGTH— IN. [mm]	FACE AREA FT ² [m ²]	CIRCUITS & TUBES HIGH
7 1/2 [26.38]-10 [35.17]	18 [457]	40 [1016]	5.0 [.46]	12
15 [52.75]-20 [70.34]	27 [686]	48 [1219]	9.0 [.84]	18

GROSS COIL PERFORMANCE

NOMINAL TONS [kW]	NOMINAL BTUH		NOMINAL CFM [L/s]	VELOCITY FPM
	STEAM	WATER		
7 1/2 [26.38]	242,500	185,000	3,000 [1416]	600
10 [35.17]	285,000	240,000	4,000 [1888]	800
15 [52.75]	465,000	375,000	6,000 [2832]	667
20 [70.34]	540,000	464,000	8,000 [3776]	888

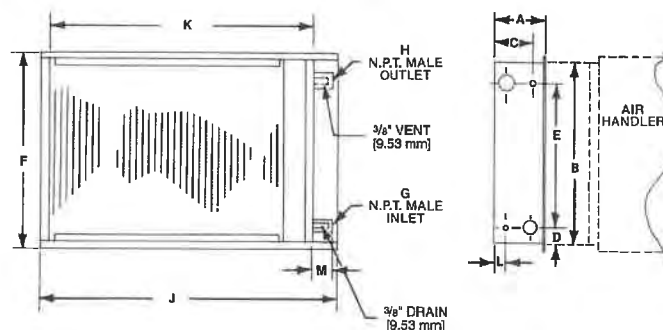
1. Entering air temperature @ 60°F
2. Entering steam @ 5 PSIG
3. Entering water @ 200°F
4. Face velocity = $\frac{\text{CFM}}{\text{Face Area}}$



STEAM COIL COIL DIMENSIONS—INCHES [mm]

MODEL	NOMINAL TONS [kW]	A	B	C	D	E	F	G	H	J	K	L	M
RXHC-C74	7 1/2 [26.38]- 10 [35.17]	9 1/16 [230]	21 3/8 [543]	5 3/8 [137]	3 3/16 [81]	15 [381]	24 [610]	1 1/2 [38]	1 1/4 [32]	51 1/2 [1308]	47 5/8 [1210]	2 13/16 [71]	3 1/4 [83]
RXHC-C76S	15 [52.75]- 20 [70.34]	9 1/16 [230]	30 7/8 [784]	5 3/8 [137]	3 3/16 [81]	24 [610]	35 [889]	2 [51]	1 1/2 [38]	59 1/2 [1511]	55 5/8 [1413]	2 13/16 [71]	3 1/2 [89]

HOT WATER COIL



HOT WATER COIL DIMENSIONS—INCHES [mm]

MODEL	NOMINAL TONS [kW]	A	B	C	D	E	F	G	H	J	K	L	M
RXHC-C74W	7 1/2 [26.38]- 10 [35.17]	9 1/16 [230]	21 3/8 [543]	5 3/8 [137]	3 3/16 [81]	15 [381]	24 [610]	1 1/4 [32]	1 1/4 [32]	51 1/2 [1308]	47 5/8 [1210]	2 13/16 [71]	3 [76]
RXHC-C76W	15 [52.75]- 20 [70.34]	9 1/16 [230]	30 7/8 [784]	5 3/8 [137]	3 3/16 [81]	24 [610]	35 [889]	1 1/2 [38]	1 1/2 [38]	59 1/2 [1511]	55 5/8 [1413]	2 13/16 [71]	3 1/4 [83]

[] Designates Metric Conversions



AIR HANDLER ACCESSORIES (con't) HOT WATER COILS

**CURVE 2
HOT WATER COIL**

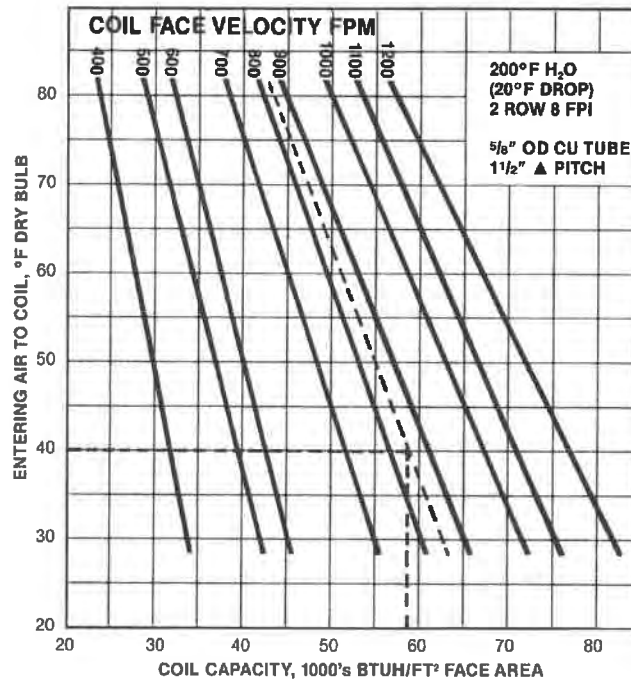


TABLE IV

Curve 2 ratings are based on 200°F entering water and 20°F temperature drop. For other conditions use the following correction factors:

ENTERING WATER °F	FACTOR	WATER TEMPERATURE DROP °F	FACTOR
220	1.14	10	1.030
210	1.07	15	1.015
200	1.00	20	1.000
190	.98	25	.985
180	.93	30	.970

HOT WATER COIL SELECTION:

Specified:

Entering Air Temp. @ 40°F

5000 CFM @ 6000 Ft. Elevation

220°F Entering Water Temp. @ 36 GPM

Select 10 Ton Nominal Coil:

Face Area = 5 Ft²

Circuits = 12

Determine Coil Performance:

From Table I, Altitude and Temperature Correction Factor = 1.19 Std. CFM = 5000/1.19 = 4202

Face Velocity = 4202/5 = 840 FPM

From Curve 2, BTUH/Ft² = 57,500

Coil Capacity = 5 x 57,500 = 287,500 BTUH

Water Temp. Drop = 290,000/(500 x 36) = 16.1°F

From Table IV, Water Temp. Factor = 1.14

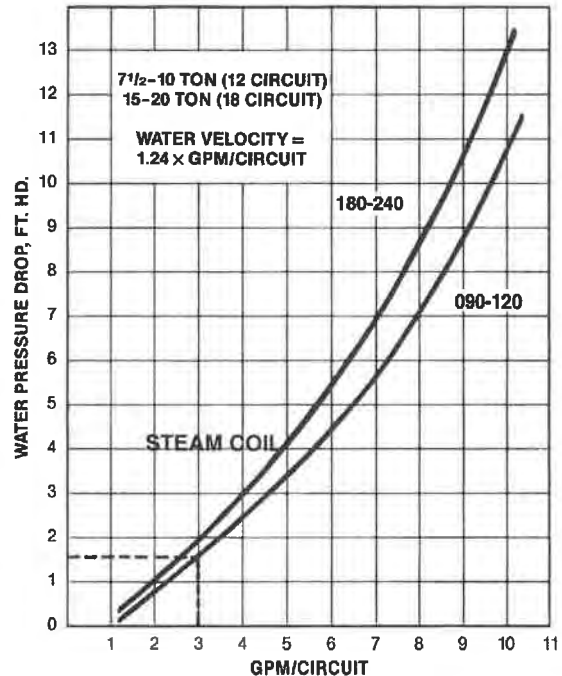
From Table IV, Water Temp. Drop Factor = 1.012

Total Capacity = 287,500 x 1.14 x 1.015 = 334,570 BTUH

From Curve 3, Water Pressure Drop 36 GPM/12 Circuits = 3 GPM/Circuit = 1.6 FT. HD.

From Table II, Air Side Pressure Drop = .38" H₂O

**CURVE 3
HOT WATER COIL WATER
PRESSURE DROP**



BASIC FORMULA:

$$\text{Air Temperature Rise, } ^\circ\text{F} = \frac{\text{BTUH}}{1.08 \times \text{CFM}}$$

$$\text{Water Temperature Drop, } ^\circ\text{F} = \frac{\text{BTUH}}{500 \times \text{GPM}}$$

AIR HANDLER ACCESSORIES (con't) STEAM COILS AIRFLOW

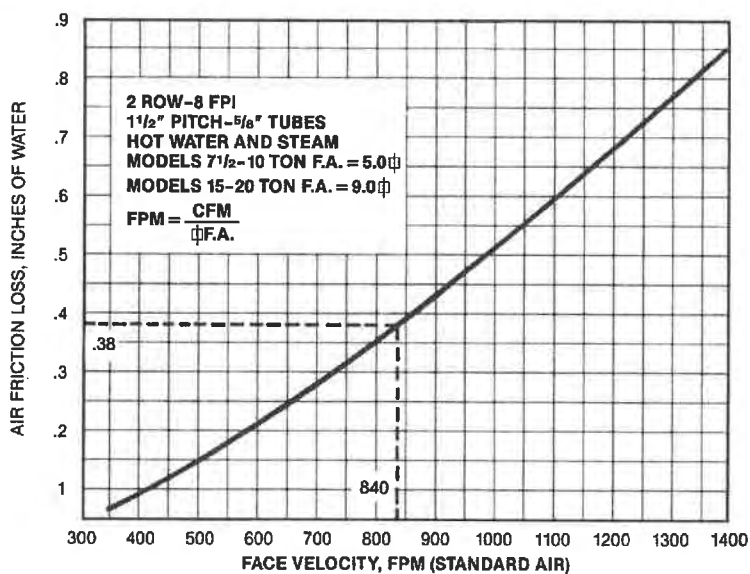
TABLE I
ALTITUDE AND TEMPERATURE CORRECTION FACTOR TABLE

AIR TEMP. (F)	ALTITUDE IN FEET ABOVE SEA LEVEL															
	0	500	1000	1500	2000	2500	3000	3500	4000	4500	5000	6000	7000	8000	9000	10,000
0	.87	.89	.91	.92	.94	.96	.98	.99	1.01	1.03	1.05	1.09	1.13	1.17	1.22	1.26
40	.94	.96	.98	1.00	1.02	1.04	1.06	1.08	1.10	1.12	1.14	1.19	1.23	1.28	1.32	1.36
70	1.00	1.02	1.04	1.06	1.08	1.10	1.12	1.14	1.19	1.18	1.20	1.25	1.30	1.35	1.40	1.45
100	1.06	1.08	1.10	1.12	1.14	1.16	1.19	1.21	1.23	1.25	1.28	1.33	1.38	1.43	1.48	1.54
120	1.09	1.12	1.14	1.16	1.18	1.20	1.23	1.25	1.28	1.30	1.32	1.38	1.43	1.48	1.53	1.58

EXAMPLE: Determine Equivalent "Standard Air" for use in System Performance Calculations:

$$\text{Standard Air} = \frac{\text{Specified CFM}}{\text{Correction Factor}}$$

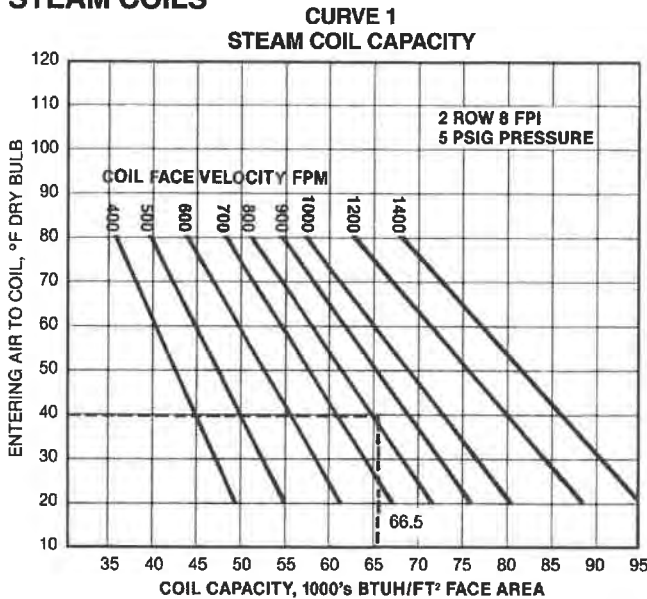
TABLE II
AIR FRICTION LOSS





AIR HANDLER ACCESSORIES (con't)

STEAM COILS



TEMPERATURE OF STEAM AT VARIOUS PRESSURES

Approximate Gauge Pressure (lbs.)	2	5	10	15	20	30
Temperature °F	218	227	240	250	259	275

TABLE III

Steam Coil Capacity, factors are based on 5 PSIG Steam Pressure. For other conditions use the adjacent correction factors.

STEAM PR., PSIG	FACTOR
2	.96
5	1.00
10	1.06
15	1.11
20	1.16
30	1.24

BASIC FORMULA:

$$\text{Air Temperature Rise, } ^\circ\text{F} = \frac{\text{BTUH}}{1.08 \times \text{CFM}}$$

STEAM COIL SELECTION:

Specified:

Steam @ 30 PSIG
Entering Air Temp. @ 40°F Dry Bulb
5000 CFM @ 6000 Ft. Elevation

Select 10 Ton Nominal Coil:

Face Area = 5 Ft²
Circuits = 12

Determine Coil Performance:

From Table I (page 21), Altitude and Temperature Correction Factor = 1.19

Std. CFM = 5000/1.19 = 4202

Face Velocity = 4202/5 = 840 FPM

From Curve 1, BTUH/Ft = 66,500

Coil Capacity = 5 x 65,000 = 325,000 BTUH

From Table III, Steam Correction Factor = 1.24

Total Coil Capacity = 1.24 x 325,000 = 403,000 BTUH

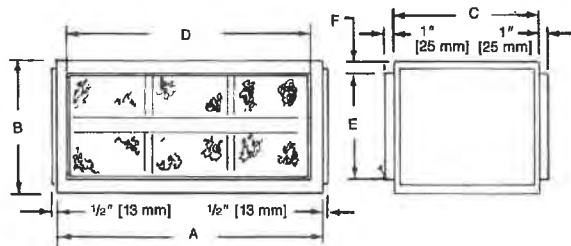
Air Temp. Rise = 403,000/(1.08 x 4202) = 90.85°F

From Table II, Air Side Pressure Drop = .38" H₂O

FILTER RACK

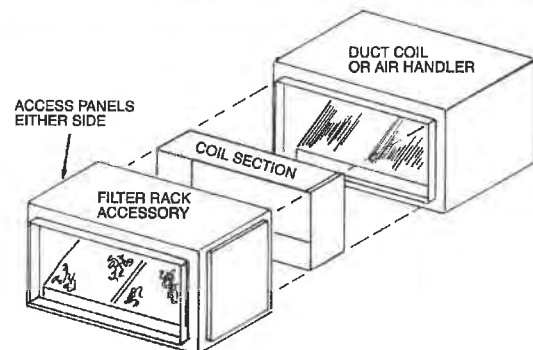
The filter rack accessory can be connected directly to the hot water/steam coil accessory. The filter rack accessory is ONLY needed when hot water steam coils are used.

MODEL NO.	AIR HANDLER SIZES USE ON	IN. [mm]					
		A	B	C	D	E	F
RXHF-B74A	090, 120	51 1/2 [1308]	24 [610]	25 1/8 [638]	47 3/8 [1203]	197/8 [505]	21 1/8 [52]
RXHF-B76A	180, 240	59 1/2 [1511]	34 1/2 [876]	27 [686]	55 1/2 [1410]	30 1/2 [775]	2 [51]



FILTER PRESSURE DROP:

MODEL NO.	CFM [L/s] x 1000 [472]								
	2	3	4	5	6	7	8	9	10
RXHF-B74A	.01 [2]	.02 [4]	.03 [7]	.07 [16]	.10 [22]	.15 [33]	—	—	—
RXHF-B76A	—	—	—	—	.05 [11]	.06 [13]	.10 [22]	.12 [27]	.15 [33]



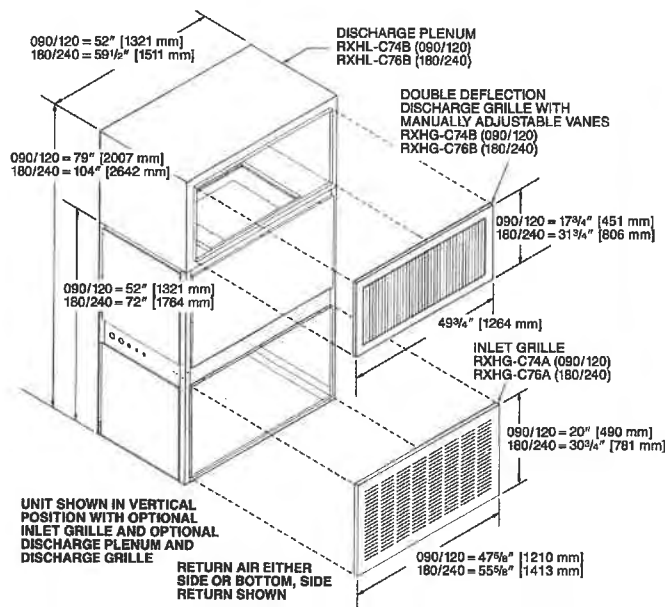
MODEL NO.	FILTER SIZE (QTY.) TYPE
RXHF-B74A	16x20x1 (4) Disposable 20x20x1 (2) Disposable
RXHF-B76A	20x25x1 (6) Disposable

[] Designates Metric Conversions

AIR HANDLER ACCESSORIES (con't)

UNIT WITH ACCESSORIES

7.5 THROUGH 10 NOMINAL TONS [26 THROUGH 35 kW]



DOUBLE DEFLECTION DISCHARGE GRILLE

MODEL NO.	AIR HANDLER SIZES USED ON	NOMINAL CFM [L/s]	FT. [m] OF THROW
RXHG-C74B	090	3000 [1416]	0° DEFLECTION - 43' [13.1] 22° DEFLECTION - 37' [11.3] 45° DEFLECTION - 22' [6.7]
	120	4000 [1888]	0° DEFLECTION - 53' [16.2] 22° DEFLECTION - 46' [14] 45° DEFLECTION - 27' [8.2]
RXHG-C76B	180	6000 [2831]	0° DEFLECTION - 52' [15.8] 22° DEFLECTION - 36' [11] 45° DEFLECTION - 18' [5.5]
	240	8000 [3775]	0° DEFLECTION - 65' [19.8] 22° DEFLECTION - 45' [13.7] 45° DEFLECTION - 22' [6.7]

TYPICAL APPLICATION

7.5, 10, 15 AND 20 NOMINAL TONS
[26, 35, 53 AND 70 kW]

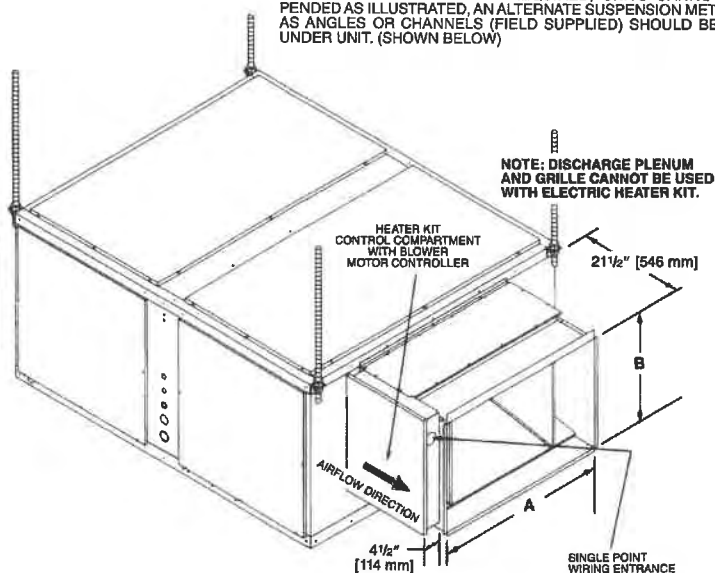
OPTIONAL ELECTRICAL HEATER KIT SHOWN INSTALLED IN HORIZONTAL POSITION AND CONNECTED DIRECTLY TO THE AIR HANDLER. THE HEATER KIT MAY ALSO BE INSTALLED WITH THE AIR HANDLER SET IN THE VERTICAL POSITION. IN EITHER POSITION THE HEATER KIT CONTROL COMPARTMENT MUST BE ON THE LEFT SIDE FACING THE AIR DISCHARGE OPENING.

FOUR HEAVY GAUGE ANGLES ARE FURNISHED (SHIPPED LOOSE) FOR SUSPENDING UNITS FROM ALL FOUR CORNERS, MINIMUM OF 1/2" [13] SUPPORT RODS ARE RECOMMENDED. IF ALL-THREAD IS USED, IT IS ALSO RECOMMENDED THAT TWO NUTS AND TWO LOCKWASHERS BE TIGHTENED SECURELY AGAINST THE SUSPENSION ANGLES.

WHEN HOT WATER OR STEAM COIL, MIXING BOX OR DISCHARGE AIR PLENUM ACCESSORIES ARE REQUIRED, UNITS CANNOT BE SUSPENDED AS ILLUSTRATED, AN ALTERNATE SUSPENSION METHOD SUCH AS ANGLES OR CHANNELS (FIELD SUPPLIED) SHOULD BE LOCATED UNDER UNIT. (SHOWN BELOW)

MODEL NO.	AIR HANDLERS SIZES USED ON	IN. [mm]	
		A	B
RXHE-DE****A	090, 120	20 [508]	20 [508]
RXHE-CE****C	180, 240	36 [914]	24 [610]

THE BOTTOM OF THE AIR HANDLER SHOULD BE SLOPED IN TWO PLANES THAT PITCH THE CONDENSATE TO THE DRAIN CONNECTION. THE DRAIN PAN SHOULD NOT LEAVE PUDDLES LARGER THAN 2 INCHES IN DIAMETER AND 1/8 INCH DEEP FOR MORE THAN 3 MINUTES.



[] Designates Metric Conversions

MIXING BOX ACCESSORY—OPERATING SEQUENCE

COOLING SEASON—Thermostat set at “Cool” and “Fan Auto,” outside air damper goes to “minimum fresh air” position when cooling thermostat closes, energizing mechanical cooling. When cooling thermostat is satisfied, mechanical cooling is de-energized, and outside air damper closes.

INTERMEDIATE SEASON—Same as for cooling season, except that cooling thermostat closes, starting indoor blower motor, the enthalpy control, mounted on outside air, determines if “free” cooling or mechanical cooling should be utilized. If outside air conditions are suitable for cooling, the mechanical cooling remains off and the mixed air controller modulates the damper motor to assume the proper damper position to maintain mixed air setting. If outside conditions

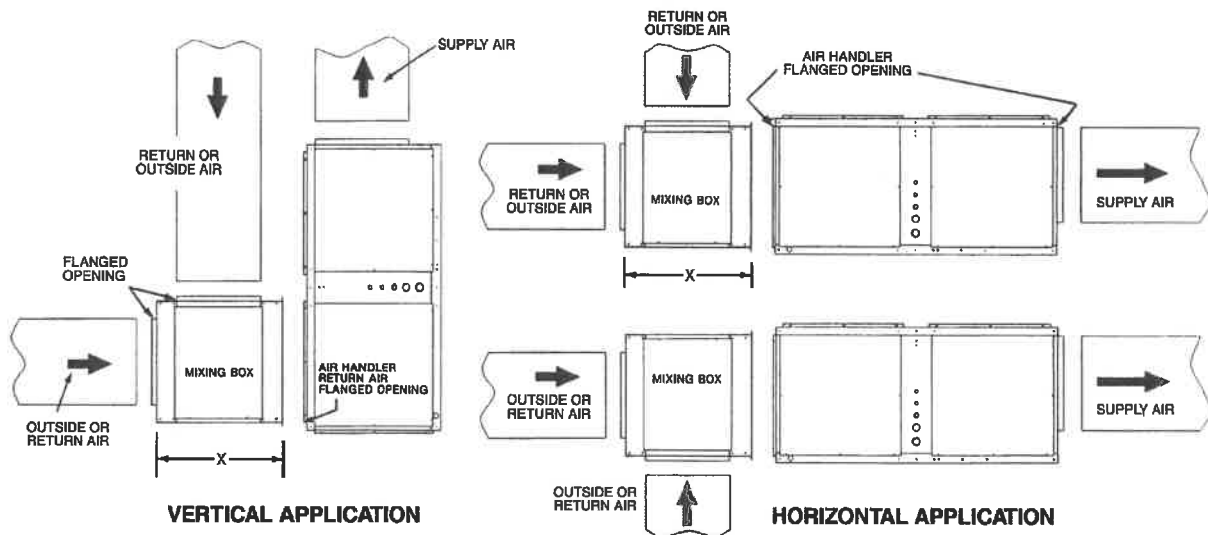
are not suitable for cooling, then the dampers go to “minimum fresh air” position and mechanical cooling is energized.

HEATING SEASON—Damper always stays at “minimum fresh air” position while fan motor is operating. Outside air damper closes when blower motor is off. “Minimum fresh air” position must not allow mixed air temperatures to air handler below 50°F. [10°C] during heating seasons.

CAUTION: IT IS NOT RECOMMENDED THAT HOT WATER OR STEAM COILS BE USED WITH THE MIXING BOX ACCESSORY WITHOUT A SUITABLE FREEZE-STAT TO PREVENT THE POSSIBILITY OF FREEZING THE COIL.

MIXING BOX

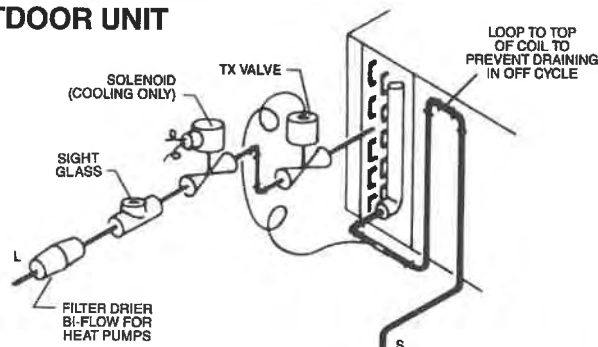
MODEL NO.	AIR HANDLER SIZES USED ON	FLANGED DUCT OPENINGS		IN. [mm]
		LENGTH IN. [mm]	WIDTH IN. [mm]	“X”
RXHM-BC74H	090, 120	42 [1067]	16 ⁷ / ₈ [454]	27 [686]
RXHM-BC76H	180, 240	48 ³ / ₈ [1229]	22 [559]	32 [813]



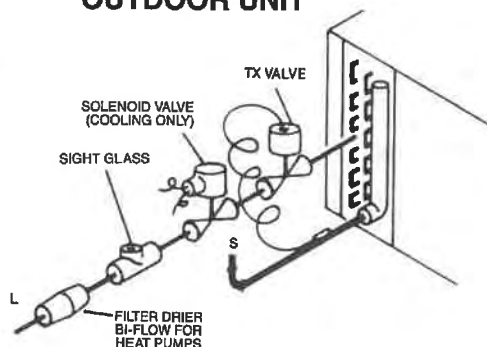
[] Designates Metric Conversions

TYPICAL PIPING RECOMMENDATIONS

INDOOR COIL ABOVE OUTDOOR UNIT



INDOOR COIL BELOW OUTDOOR UNIT



NOTE: PIPING ACCESSORIES SHOWN SHOULD BE MOUNTED AS CLOSE TO AIR HANDLING UNIT AS POSSIBLE.

The 7.5 [26 kW] and 10 [35 kW] Air Handlers are designed as two (2) circuit, full face equal distribution coils. As shipped from the factory, the suction and liquid lines are dual circuits. Copper fittings are supplied in the unit to field manifold the suction and liquid lines for single circuit.

NOTE: The expansion valve bulbs must be secured to the corresponding suction lines. The circuits are marked accordingly. See illustration under Typical Piping recommendations for additional information.

When dual straight cool condensing units are used refer to the refrigerant piping size charts for the individual condensing unit piping.

REFRIGERANT PIPING (See Tables at Right)

The following will be of help in accomplishing a successful installation.

1. Size liquid line for no more than 50 PSIG [345 kPa] pressure drop.
2. Size suction lines for no more than 2°F [1.1°C] loss which corresponds to approximately 5 PSIG [34 kPa] pressure drop.
3. When indoor unit is installed below outdoor unit, do not exceed the recommended vapor line O.D. This will insure adequate velocities for proper oil return.
4. Install strainer-drier and sight glass in liquid line.
5. Pitch all horizontal suction lines downward in the direction of flow for cooling only applications.
6. Locate the outdoor unit and indoor unit as close together as possible to minimize piping runs.
7. A liquid line solenoid installed just ahead of the expansion valve is recommended for cooling only applications. Be sure condensing unit is suitable for pump down.
8. Piping runs between condenser and evaporator not to exceed 150' [46 m] linear length (90' [27 m] linear length for heat pumps).

NOTE: Refer to suction and liquid line pressure drop charts found in condensing unit and remote heat pump literature.

[] Designates Metric Conversions

CONDENSATE DRAIN PIPING

- Consult local codes or ordinances for specific requirements regarding condensate drain.
- Condensate drain is open to atmosphere and must be trapped. Trap must be at least 3 inches [76 mm] deep and made of flexible material or fabricated to prevent freeze-up.
- Pitch the drain line at least 1/4 inch [6 mm] per foot away from the drain pan.
- Do not reduce the drain line size from the connection size provided on the unit.
- Do not connect the drain line to a closed sewer line.

PIPING SIZES 090 & 120

LINEAR LENGTH, FT. [m]	LIQUID LINE O.D., IN. [mm]		SUCTION LINE O.D., IN. [mm]	
	090	120	090	120
0-50 [0-15]	1/2 [13]	5/8 [16]	1 1/8 [29]	1 3/8 [35]
51-100* [16-30]	1/2 [13]	5/8 [16]	1 3/8 [35]	1 5/8 [41]
101-150 [31-46]	1/2 [13]	5/8 [16]	1 3/8 [35]	1 5/8 [41]

*For cooling only, refer to remote heat pump literature for piping recommendations.

PIPING SIZES 180 & 240

LINEAR LENGTH, FT. [m]	LIQUID LINE O.D., IN. [mm]		SUCTION LINE O.D., IN. [mm]	
	180	240	180	240
0-50 [0-15]	3/4 [19]	7/8 [22]	1 3/8 [35]	1 5/8 [41]
51-100 [16-30]	3/4 [19]	7/8 [22]	1 5/8 [41]	2 1/8 [54]
101-150 [31-46]	3/4 [19]	7/8 [22]	2 1/8 [54]	2 1/8 [54]

EQUIVALENT LENGTH, FT. [m] OF STRAIGHT TYPE "L" TUBING FOR NON-FERROUS VALVES AND FITTINGS (BRAZED)

TUBE SIZE INCHES [mm] O.D.	SOLENOID VALVE	ANGLE VALVE	SHORT RADIUS ELL	LONG RADIUS ELL	TEE LINE FLOW	TEE BRANCH FLOW
1/2 [13]	12 [3.7]	8.3 [2.5]	1.6 [0.5]	1.0 [0.3]	1.0 [0.3]	3.1 [0.9]
5/8 [16]	15 [4.6]	10.4 [3.2]	1.9 [0.8]	1.2 [0.4]	1.2 [0.4]	3.6 [1.1]
3/4 [19]	18 [5.5]	12.5 [3.8]	2.1 [0.7]	1.4 [0.4]	1.4 [0.4]	4.2 [1.3]
7/8 [22]	21 [6.4]	14.8 [4.4]	2.4 [0.7]	1.6 [0.5]	1.6 [0.5]	4.8 [1.5]
1 1/8 [29]	12 [3.7]	18.8 [5.7]	3.0 [0.9]	2.0 [0.6]	2.0 [0.6]	6.0 [1.8]
1 3/8 [35]	15 [4.6]	22.9 [7.0]	3.6 [1.1]	2.4 [0.7]	2.4 [0.7]	7.2 [2.2]
1 5/8 [41]	18 [5.5]	27.1 [8.3]	4.2 [1.3]	2.8 [0.8]	2.8 [0.8]	8.4 [2.6]
2 1/8 [54]	21 [6.4]	35.4 [10.8]	5.3 [1.6]	3.5 [1.1]	3.5 [1.1]	10.7 [3.3]



OPERATING SEQUENCE

NOTE: Please refer to specification sheets covering RAWL- condensing units for operating sequence.

GUIDE SPECIFICATIONS

Furnish and install as shown on the drawing Rheem Model _____ draw through air handler suitable for both horizontal and vertical applications. The entire assembly shall be UL and cUL listed with the cooling (and heat pump heating) capacity AHRI Certified.

DRIVE PACKAGE—A complete drive package shall be factory or field installed. Package shall consist of a 3450 RPM dual voltage, single phase open drip proof motor or a 3 phase 1750 RPM open drip proof internally protected motor, not requiring an external starter. Variable pitch motor sheave, fixed pitch fan sheave, and belt.

COILS—Coils shall be fabricated of $\frac{3}{8}$ " [10 mm] O.D. seamless copper tubing expanded into aluminum fins. All coils shall be submitted to an air pressure test of up to 550 PSIG [2068 kPa] under water after fabrication and dehydrated prior to assembly in unit. Units shall be shipped with a nitrogen holding charge. Airflow shall be draw through design providing uniform air distribution across the coil surface.

BLOWER, BEARINGS AND SHAFT—Fans shall be a double width, double inlet, forward curve, centrifugal type, statically and dynamically balanced, and constructed of galvanized steel. They shall be mounted on $\frac{3}{4}$ " [19 mm] = 7.5 ton [26 kW] & 10 ton [35 kW], diameter solid shafts made of high carbon steel, centerless ground and polished, supported by resilient mounted sealed bearings.

DRAIN PAN—The drain pan shall be manufactured of zinc coated steel. The pan shall have internally threaded pipe size drain connections and shall be designed to accept condensate in either horizontal or vertical type applications on either side of unit.

FILTERS—Filter mounting hardware shall be designed to accept up to 2" [51 mm] filters for field replacement. One inch [25 mm] throw away filters shall be furnished with the unit.

CABINET—Cabinets shall be manufactured of galvanized steel subjected to multi-stage cleaning and finished with powder coat paint. Units shall have removable service access panels on each side and top.

INSULATION—Cabinets shall be insulated with $\frac{1}{2}$ " [13 mm] by $1\frac{1}{2}$ pound [.68 kg] density fiberglass insulation coated with neoprene and bonded to the cabinet surface with a U.L. approved adhesive. Insulation shall have fire retarding characteristics in accordance with smoke developed rating not to exceed 50 and flame spread rating of 25 per Underwriters Laboratories testing procedures.

FACTORY TESTING—In addition to the pre-assembly testing mentioned above, each coil shall be leak tested after assembly into the unit. While under pressure, the coil shall be leak tested using an Electronic Leak Detector.

ELECTRIC HEATERS—UL and cUL listed electric heater kits shall be available in a wide range of capacities. All kits shall offer two stages of capacity, blower motor controller and single point connection. Heater kits shall be available for installation directly on the supply fan discharge for either horizontal or vertical application.

MIXING BOX—Mixing box accessory shall be available for mixing return air with outside air before entering the air handler. The accessory shall include both return and outside air dampers and economizer controls factory mounted. Economizer controls shall include enthalpy and mixed air sensors and damper motors. Mixing box accessory shall be available for installation to the return air section of the air handler for either horizontal or vertical applications.

DISCHARGE PLENUM AND GRILLE—Shall be available for vertical application. Discharge grille shall provide manually adjustable double deflection discharge vanes.

RETURN AIR GRILLES—Shall be provided for vertical return applications.

HOT WATER OR STEAM COILS—Shall be available for field installation. All coils shall be tested to 300 psi. Coils shall be available for either horizontal or vertical air handler applications.

[] Designates Metric Conversions

GENERAL TERMS OF LIMITED WARRANTY*

Rheem will furnish a replacement for any part of this product which fails in normal use and services within the applicable periods stated below, in accordance with the terms of the limited warranty.

Any Part One (1) Year

*For Complete Details of the Limited Warranty, Including Applicable Terms and Conditions, See Your Local Installer or Contact the Manufacturer for a Copy.

Before proceeding with installation, refer to installation instructions packaged with each model, as well as complying with all Federal, State, Provincial, and Local codes, regulations, and practices.

**Rheem Heating,
Cooling and
Water Heating**

P.O. Box 17010, Fort Smith, AR 72917



"In keeping with its policy of continuous progress and product improvement, Rheem reserves the right to make changes without notice."

PRINTED IN U.S.A.

8-10 DC

FORM NO. H11-529 REV. 6
Supersedes Form No. H11-529 Rev. 5

Commercial High-Efficiency Condensing Units



R-410A



10 & 12.5 TON MODEL
[35.2 & 44.0 kW]



15 & 20 TON MODEL
[52.8 & 70.3 kW]



10 THROUGH 20 NOMINAL TON UNITS
[35.2 THROUGH 70.3 kW]
RAWL- SERIES



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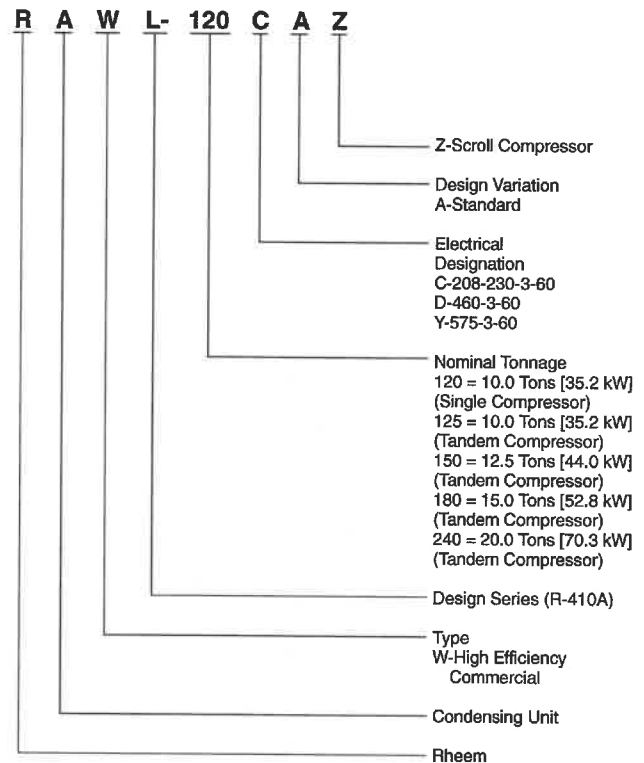
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WHY USE A HIGH EFFICIENCY, AIR COOLED SPLIT SYSTEM?

- The size ranges offered by Rheem® allow you to mix or match components to meet actual job requirements, thus eliminating the need to use oversized or undersized equipment. Equipment sized to meet the actual load will provide better operating economy, better humidity control, and longer equipment life.
- With an air cooled system, you have no water or sewer connections to make, and no troublesome and costly water treatment problems.
- Since the condensing unit is located outside the building, and the low profile air handling unit can be installed in the drop ceiling or in the conditioned space, you will not need a separate equipment room which takes up valuable building space.
- Remote mounting of the already quiet condensing unit keeps the compressor and condenser fan noise outside, and the vertical discharge fans carry the sound up and away from the surrounding area.
- Because of the simple design of the Rheem condensing unit, installation is quick and simple, and very little maintenance is required.
- Energy Efficiency Ratings (EER's) to 11.2!

MODEL NUMBER DESIGNATION



[] Designates Metric Conversions

CONDENSING UNIT ACCESSORIES

ACCESSORY DESCRIPTION	MODEL NUMBER	SIZES USED ON
Sight Glass	RXAG-A048	120, 125
Sight Glass	RXAG-A020	180, 240
Liquid Line Solenoid Valve*	RXAV-CD120	120, 125, 150
Liquid Line Solenoid Valve*	RXAV-CD180	180, 240

*Cannot be used as a pump down solenoid.

STANDARD UNIT FEATURES

CABINET—Galvanized steel with a durable powder paint finish. Stamped louvered panels offer 100% protection for the condenser coil.

COMPRESSOR—The Scroll Compressor is hermetically sealed with internal overload protection and durable insulation on motor windings. The entire compressor is mounted on rubber grommets to reduce vibration and noise.

CONDENSER COIL—Constructed with copper tubes and aluminum fins mechanically bonded to the tubes for maximum heat transfer capabilities.

BASE PAN—Galvanized steel with powder paint finish.

REFRIGERANT CONNECTIONS—Field piping connections are made through a fixed panel. This allows removal of access panels after piping connections have been made.

CRANKCASE HEATERS—Standard, all models. Prevents refrigerant migration to compressor(s).

LOW AMBIENT CONTROL—A pressure sensitive fan cycling control to allow unit operation down to 0°F [-17.8°C] is standard.

SERVICE VALVES—Standard on liquid and suction lines. Allows outdoor section to be isolated from indoor coil.

SERVICE ACCESS—Control box as well as the compressor and other refrigerant controls are accessible through access panels. Control box may be open without affecting the normal operation of the unit. Condenser fan motors are accessible by removing wire grilles.

FILTER DRIER—Standard (uninstalled) on all models. Helps ensure refrigerant cleanliness.

TRANSFORMER—Step-down type, line to 24 volts. Provides control circuit voltage.

CONTACTOR—The contactor is an electrical switch which operates the compressor and condenser fans.

HIGH PRESSURE CONTROL—Opens the contactor circuit on high refrigerant pressure; manual reset.

LOW PRESSURE CONTROL—Stops compressor operation in the event of loss of refrigerant.

CONDENSER FAN MOTOR (Direct Drive)—Ball bearing 1075 RPM motors are mounted to minimize vibration and noise problems. These are permanent split capacitor types.

TESTING—All units are run tested at the factory prior to shipment. Units are shipped with a holding charge of nitrogen.

EXTERNAL GAUGE PORTS—Allows pressures to be checked without removing access panel.

COIL LOUVERS—Helps prevent damage to outdoor coils.

TIME DELAY—Supplied on tandem compressor models to provide a delay between stages.

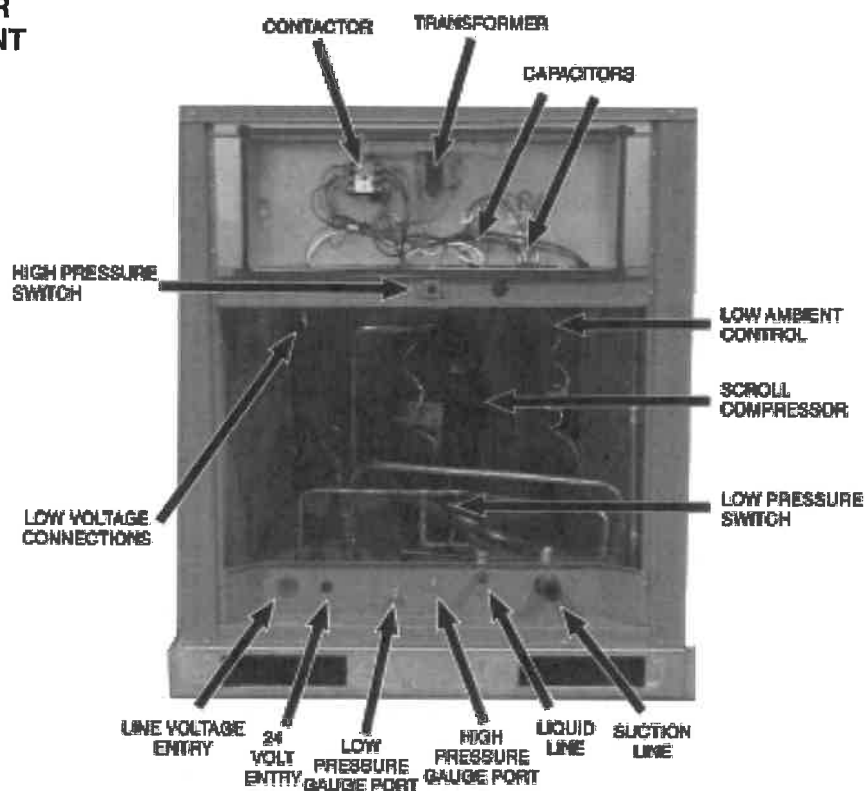
EQUIPMENT GROUND—Lug for field connection of ground wire.

[] Designates Metric Conversions

10, 12.5, 15 & 20 TON [35.2, 44.0, 52.8 & 70.3 kW] MODELS

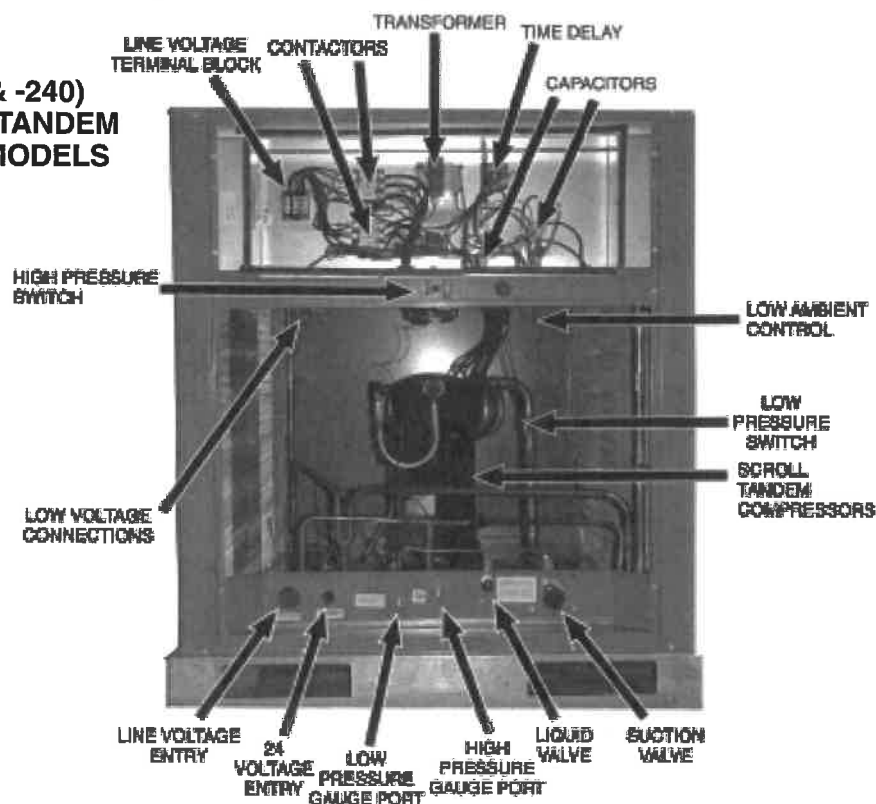
COMPRESSOR COMPARTMENT

RAWL-120



CONTROL BOX

RAWL
(-125, -150, -180 & -240)
SHOWN, OTHER TANDEM
COMPRESSOR MODELS
TYPICAL



SELECTION PROCEDURE— MATCHED SYSTEMS

Example 1: Determine the Net System Performance of Condensing Unit RAWL-120 with RHGL-120 at 3800 CFM [1793.4 L/s] at .30" external static pressure [.07 kPa], 80°F [26.7°C] DB/67°F [19.4°C] WB entering indoor air and 95°F [35.0°C] DB outdoor ambient.

From Cooling Performance Data, Condensing Unit RAWL-120 with Air Handler RHGL-120

$$\text{Total Cap. (gross)} = 121.8 \times 1000 = 121,800 \text{ BTUH [35.69 kW]}$$

$$\text{Sens. Cap. (gross)} = 91.3 \times 1000 = 91,300 \text{ BTUH [26.76 kW]}$$

$$\text{Power (gross)} = 9.1 \times 1000 = 9,100 \text{ WATTS}$$

From Commercial Air Handler Form Airflow Performance Data.

$$\text{Power} = 1,455 \text{ WATTS (K-Drive, 2 turns open)}$$

$$= 1,455 \times 3,412 = 4,964 \text{ BTUH [1.4 kW]}$$

Therefore, the Net Performance is:

$$\text{Total Cap. (net)} = 121,800 - 4,964 = 116,836 \text{ BTUH [34.24 kW]}$$

$$\text{Sens. Cap (net)} = 91,300 - 4,964 = 86,336 \text{ BTUH [25.30 kW]}$$

$$\text{Power (net)} = 9,100 + 1,455 = 10,555 \text{ WATTS}$$

$$\text{EER} = 116,836 \div 10,555 = 11.07 \text{ BTUH/WATT [3.24 w/w]}$$

Example 2: Determine the Sensible Net Capacity at 75°F [23.9°C] DB entering indoor air with the other conditions from Example 1 being the same.

From Cooling Performance Data, Condensing Unit RAWL-120 with Air Handler RHGL-120

$$\text{Sens. Cap (net)} = 86,336 \text{ BTUH [25.30 kW]} \text{ (from Example 1)}$$

Adjust Capacity for temperature other than 80°F [26.7°C] entering air:

$$\text{adjustment: } [1.10 \times 3,800 \times (1-.16) \times (75-80)] = -17,556 \text{ BTUH [5.14 kW]}$$

Therefore, Sensible Capacity (net) at 75°F [23.9°C] entering air is:

$$86,336 - 17,556 = 68,780 \text{ BTUH [20.15 kW]} \text{ (Sensible)}$$

[] Designates Metric Conversions

CONDENSING UNIT—GROSS CAPACITY AND POWER

RAWL-120						
°F [°C] OUTDOOR AMBIENT TEMPERATURE	SATURATED EVAPORATOR TEMPERATURE °F [°C]					
	40 [4.4]		45 [7.2]		50 [10.0]	
	MBH [kW]	KW	MBH [kW]	KW	MBH [kW]	KW
75 [24]	118.0 [34.58]	7.2	129.4 [37.91]	7.3	141.2 [41.37]	7.5
80 [27]	114.6 [33.59]	7.5	125.7 [36.83]	7.7	137.2 [40.20]	7.9
85 [29]	111.2 [32.59]	7.9	122.0 [35.75]	8.1	133.2 [39.03]	8.2
90 [32]	107.8 [31.60]	8.3	118.3 [34.66]	8.5	129.2 [37.87]	8.6
95 [35]	104.4 [30.60]	8.7	114.6 [33.58]	8.9	125.3 [36.70]	9.0
100 [38]	101.0 [29.61]	9.1	110.9 [32.50]	9.3	121.3 [35.53]	9.4
105 [41]	97.6 [28.61]	9.5	107.2 [31.42]	9.7	117.3 [34.37]	9.8
110 [43]	94.3 [27.62]	9.9	103.5 [30.34]	10.1	113.3 [33.20]	10.2
115 [46]	90.9 [26.62]	10.3	99.8 [29.25]	10.4	109.3 [32.03]	10.6

RAWL-125						
°F [°C] OUTDOOR AMBIENT TEMPERATURE	SATURATED EVAPORATOR TEMPERATURE °F [°C]					
	40 [4.4]		45 [7.2]		50 [10.0]	
	MBH [kW]	KW	MBH [kW]	KW	MBH [kW]	KW
75 [24]	117.5 [34.43]	7.0	128.6 [37.68]	7.1	140.3 [41.12]	7.2
80 [27]	114.0 [33.39]	7.4	124.9 [36.59]	7.5	136.4 [39.95]	7.7
85 [29]	110.4 [32.35]	7.9	121.2 [35.50]	8.0	132.4 [38.78]	8.1
90 [32]	106.9 [31.31]	8.3	117.4 [34.41]	8.4	128.4 [37.62]	8.5
95 [35]	103.3 [30.27]	8.7	113.7 [33.32]	8.8	124.4 [36.45]	9.0
100 [38]	99.8 [29.23]	9.2	110.0 [32.23]	9.3	120.4 [35.28]	9.4
105 [41]	96.2 [28.19]	9.6	106.3 [31.14]	9.7	116.4 [34.11]	9.9
110 [43]	92.7 [27.15]	10.1	102.5 [30.05]	10.1	112.4 [32.94]	10.3
115 [46]	89.1 [26.11]	10.5	98.8 [28.96]	10.6	108.4 [31.77]	10.7

RAWL-150						
°F [°C] OUTDOOR AMBIENT TEMPERATURE	SATURATED EVAPORATOR TEMPERATURE °F [°C]					
	40 [4.4]		45 [7.2]		50 [10.0]	
	MBH [kW]	KW	MBH [kW]	KW	MBH [kW]	KW
75 [24]	151.6 [44.42]	9.5	164.3 [48.13]	9.6	177.2 [51.90]	9.7
80 [27]	147.0 [43.06]	10.0	159.4 [46.69]	10.1	172.0 [50.39]	10.3
85 [29]	142.3 [41.70]	10.6	154.5 [45.26]	10.7	166.8 [48.88]	10.8
90 [32]	137.7 [40.33]	11.1	149.5 [43.82]	11.2	161.7 [47.36]	11.3
95 [35]	133.0 [38.97]	11.6	144.6 [42.38]	11.7	156.5 [45.85]	11.9
100 [38]	128.3 [37.61]	12.1	139.7 [40.94]	12.3	151.3 [44.34]	12.4
105 [41]	123.7 [36.24]	12.7	134.8 [39.50]	12.8	146.2 [42.82]	12.9
110 [43]	119.0 [34.88]	13.2	129.9 [38.07]	13.3	141.0 [41.31]	13.4
115 [46]	114.4 [33.51]	13.7	125.0 [36.63]	13.8	135.8 [39.80]	14.0

KW —Condensing Unit Power (Compressor + Fan)
MBH—Gross Capacity x 1000 BTUH [kW]

NOTES: 1. All values at approximately 20°F [11.1°C] subcooling
2. Data includes 25 feet [7.62 m] of recommended vapor and liquid lines

[] Designates Metric Conversions

CONDENSING UNIT—GROSS CAPACITY AND POWER (cont.)

RAWL-180						
°F [°C] OUTDOOR AMBIENT TEMPERATURE	SATURATED EVAPORATOR TEMPERATURE °F [°C]					
	40 [4.4]		45 [7.2]		50 [10.0]	
	MBH [kW]	KW	MBH [kW]	KW	MBH [kW]	KW
75 [24]	200.8 [58.84]	11.4	216.3 [63.38]	11.8	222.7 [65.24]	12.2
80 [27]	194.3 [56.94]	12.2	209.8 [61.47]	12.6	217.8 [63.82]	12.9
85 [29]	187.8 [55.03]	13.0	203.3 [59.56]	13.3	213.0 [62.40]	13.7
90 [32]	181.3 [53.12]	13.8	196.7 [57.64]	14.1	208.1 [60.98]	14.5
95 [35]	174.8 [51.22]	14.5	190.2 [55.73]	14.8	203.3 [59.56]	15.2
100 [38]	168.3 [49.31]	15.3	183.7 [53.82]	15.6	198.4 [58.14]	16.0
105 [41]	161.8 [47.40]	16.1	177.1 [51.90]	16.3	193.6 [56.72]	16.7
110 [43]	155.3 [45.50]	16.9	170.6 [49.99]	17.1	188.7 [55.30]	17.5
115 [46]	148.8 [43.59]	17.6	164.1 [48.08]	17.8	183.9 [53.88]	18.2

RAWL-240						
°F [°C] OUTDOOR AMBIENT TEMPERATURE	SATURATED EVAPORATOR TEMPERATURE °F [°C]					
	40 [4.4]		45 [7.2]		50 [10.0]	
	MBH [kW]	KW	MBH [kW]	KW	MBH [kW]	KW
75 [24]	272.7 [79.90]	17.6	294.3 [86.23]	18.0	316.7 [92.79]	18.5
80 [27]	264.1 [77.39]	18.5	285.6 [83.67]	18.9	307.7 [90.14]	19.4
85 [29]	255.6 [74.88]	19.4	276.9 [81.12]	19.9	298.6 [87.50]	20.3
90 [32]	247.0 [72.37]	20.4	268.1 [78.56]	20.8	289.6 [84.86]	21.3
95 [35]	238.5 [69.87]	21.3	259.4 [76.01]	21.7	280.6 [82.22]	22.2
100 [38]	229.9 [67.36]	22.2	250.7 [73.45]	22.6	271.6 [79.58]	23.1
105 [41]	221.3 [64.85]	23.1	242.0 [70.89]	23.5	262.6 [76.94]	24.1
110 [43]	212.8 [62.35]	24.0	233.2 [68.34]	24.4	253.6 [74.29]	25.0
115 [46]	204.2 [59.84]	24.9	224.5 [65.78]	25.3	244.5 [71.65]	25.9

KW —Condensing Unit Power (Compressor + Fan)
MBH—Gross Capacity x 1000 BTUH [kW]

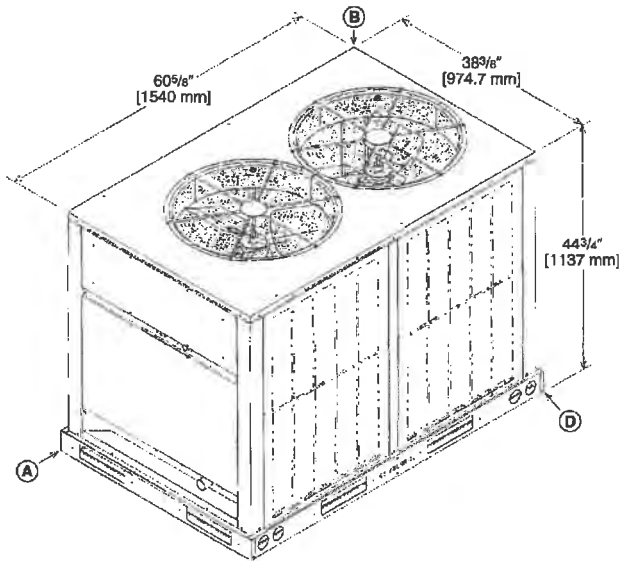
NOTES: 1. All values at approximately 20°F [11.1°C] subcooling
2. Data includes 25 feet [7.62 m] of recommended vapor and liquid lines

[] Designates Metric Conversions

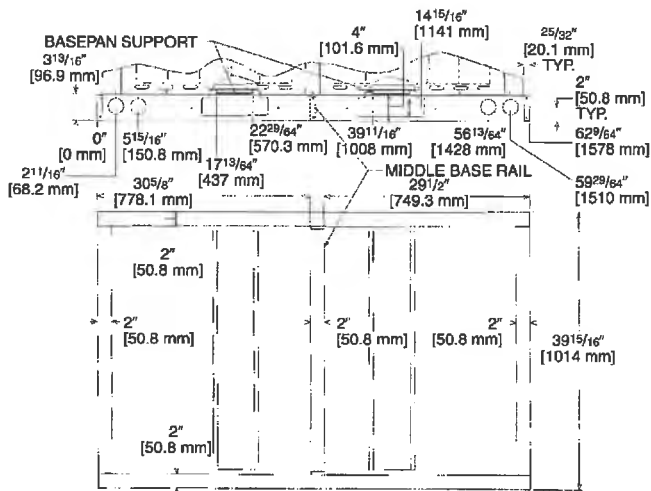
UNIT DIMENSIONS AND WEIGHTS

MODEL	TOTAL WEIGHT LBS. [kg]	Corner Weights, Lbs. [kg]			
		A	B	C	D
RAWL-120	501 [227]	123 [56]	132 [60]	119 [54]	127 [58]
RAWL-125	586 [266]	144 [65]	154 [70]	139 [63]	149 [67]
RAWL-150	650 [295]	160 [72]	171 [78]	154 [70]	165 [75]
RAWL-180	746 [338]	183 [83]	196 [89]	177 [80]	189 [86]
RAWL-240	952 [432]	234 [106]	251 [114]	226 [103]	241 [110]

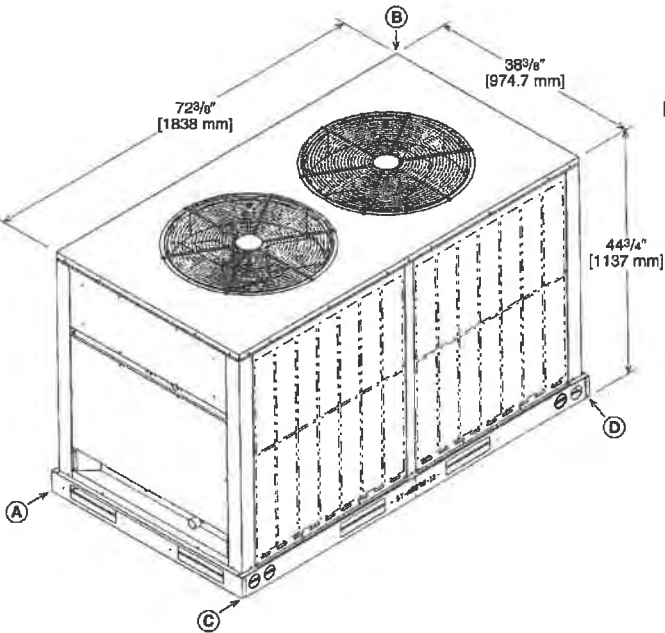
10 TON [35.2 kW]



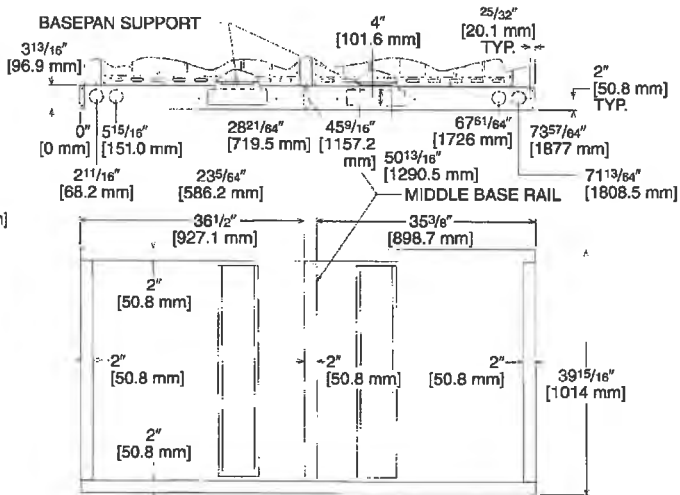
BOTTOM VIEW



12.5 TON [44 kW]

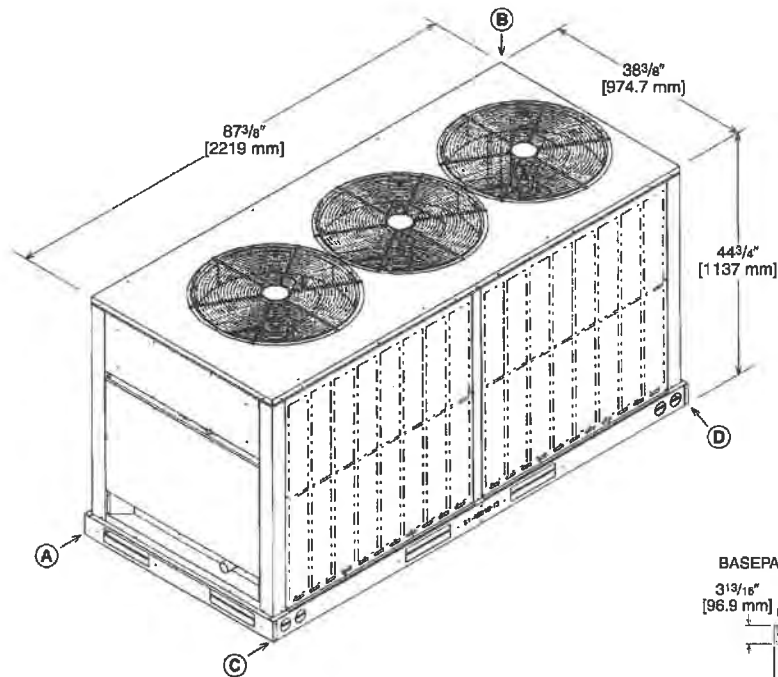


BOTTOM VIEW

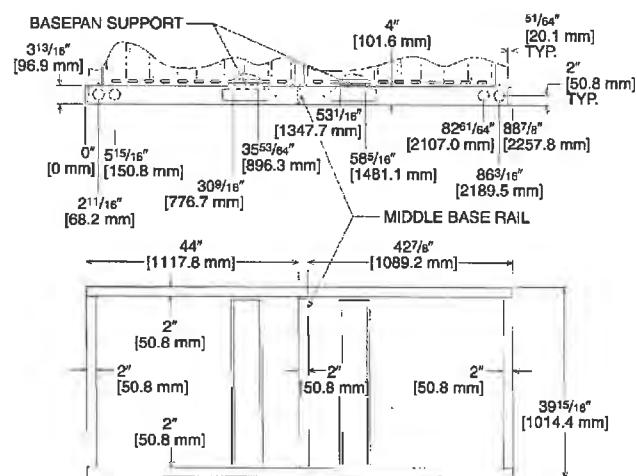


UNIT DIMENSIONS (cont.)

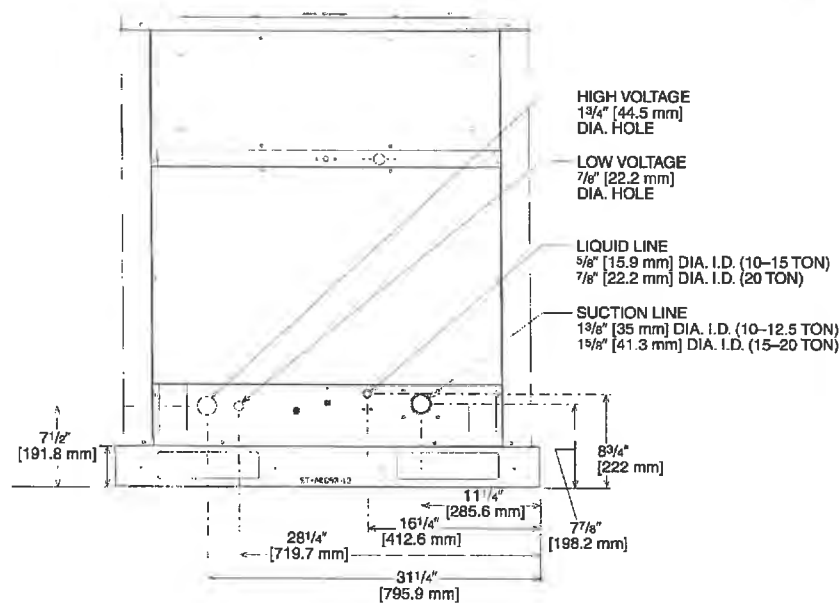
15 TON & 20 TON [52.8 kW & 70.3 kW]



BOTTOM VIEW



CONTROL ACCESS SIDE VIEW



ALL MODELS

PERFORMANCE DATA @ AHRI STANDARD CONDITIONS—COOLING: RAWL-

MODEL NUMBERS		80°F [26.5°C] DB/67°F [19.5°C] WB INDOOR AIR 95°F [35°C] DB OUTDOOR AIR					SOUND RATING dB	INDOOR CFM [L/s]
OUTDOOR UNIT RAWL-	INDOOR COIL AND/OR AIR HANDLER	TOTAL CAPACITY BTU/H [kW]	NET SENSIBLE BTU/H [kW]	NET LATENT BTU/H [kW]	EER	IPLV		
Rev. 8/14/2003 120CAZ	RHGL-120Z ①	117,000 [34.3]	86,500 [25.3]	30,500 [8.9]	11.20	N/A	88	3,800 [1793]
	RCCL-D5013	118,000 [34.6]	86,500 [25.3]	31,500 [9.2]	11.20	N/A	88	3,800 [1793]
120DAZ	RHGL-120Z	117,000 [34.3]	86,500 [25.3]	30,500 [8.9]	11.20	N/A	88	3,800 [1793]
	RCCL-D5013	118,000 [34.6]	86,500 [25.3]	31,500 [9.2]	11.20	N/A	88	3,800 [1793]
120YAZ	RHGL-120Y	117,000 [34.3]	86,500 [25.3]	30,500 [8.9]	11.20	N/A	88	3,800 [1793]
	RCCL-D5013	118,000 [34.6]	86,500 [25.3]	31,500 [9.2]	11.20	N/A	88	3,800 [1793]
125CAZ	RHGL-120Z ①	116,000 [34.0]	87,000 [25.5]	29,000 [8.5]	11.20	14	88	3,800 [1793]
	RCCL-D5013	116,000 [34.0]	85,000 [24.9]	31,000 [9.1]	11.20	14	88	3,800 [1793]
125DAZ	RHGL-120Z	116,000 [34.0]	87,000 [25.5]	29,000 [8.5]	11.20	14	88	3,800 [1793]
	RCCL-D5013	116,000 [34.0]	85,000 [24.9]	31,000 [9.1]	11.20	14	88	3,800 [1793]
125YAZ	RHGL-120Y	116,000 [34.0]	87,000 [25.5]	29,000 [8.5]	11.20	14	88	3,800 [1793]
	RCCL-D5013	116,000 [34.0]	85,000 [24.9]	31,000 [9.1]	11.20	14	88	3,800 [1793]
150CAZ	RHGL-180Z ①	146,000 [42.8]	112,000 [32.8]	34,000 [10.0]	11.10	15	88	5,000 [2360]
150DAZ	RHGL-180Z	146,000 [42.8]	112,000 [32.8]	34,000 [10.0]	11.10	15	88	5,000 [2360]
150YAZ	RHGL-180Y	146,000 [42.8]	112,000 [32.8]	34,000 [10.0]	11.10	15	88	5,000 [2360]
180CAZ	RHGL-180Z ①	178,000 [52.2]	125,000 [36.6]	53,000 [15.5]	11.00	12.3	88	5,100 [2407]
180DAZ	RHGL-180Z	178,000 [52.2]	125,000 [36.6]	53,000 [15.5]	11.00	12.3	88	5,100 [2407]
180YAZ	RHGL-180Y	178,000 [52.2]	125,000 [36.6]	53,000 [15.5]	11.00	12.3	88	5,100 [2407]
240CAZ	RHGL-240Z ①	244,000 [71.5]	169,000 [49.5]	75,000 [22.0]	10.00	13.7	88	6,900 [3256]
240DAZ	RHGL-240Z	244,000 [71.5]	169,000 [49.5]	75,000 [22.0]	10.00	13.7	88	6,900 [3256]
240YAZ	RHGL-240Y	244,000 [71.5]	169,000 [49.5]	75,000 [22.0]	10.00	13.7	88	6,900 [3256]

① Highest sales volume tested combination required by D.O.E. test procedures.

N/A = Not applicable

[] Designates Metric Conversions

ELECTRICAL & PHYSICAL DATA: RAWL-

Model No. RAWL-	ELECTRICAL										PHYSICAL				
	Phase Frequency (Hz) Voltage (Volts)	Compressor		Full Load Amperes (FLA)		Minimum Circuit Amperes	Fuse or HACR Circuit Breaker		Outdoor Coil			Refrig. Per Circuit Oz. [g]	Weight		
		Rated Load Amperes (RLA)	Locked Rotor Amperes (LRA)	Fan Motor	Minimum Amperes		Maximum Amperes	Face Area Sq. Ft. [Sq. m]	No. Rows	CFM [L/s]	Net Lbs. [kg]		Ship Lbs. [kg]		
Rev. 8/14/2008															
120CAZ	3-60-208/230	30.1/30.1	225	4.8	43/43	50/50	60/60	27.00 [2.51]	2	8000 [3775]	339 [9611]	501 [227.3]	541 [245.4]		
120DAZ	3-60-460	16.7	114	2.8	24	30	40	27.00 [2.51]	2	8000 [3775]	339 [9611]	501 [227.3]	541 [245.4]		
120YAZ	3-60-575	12.2	80	2	18	25	25	27.00 [2.51]	2	8000 [3775]	339 [9611]	501 [227.3]	541 [245.4]		
125CAZ	3-60-208/230	17.6/17.6	123	4.8	45/45	50/50	60/60	27.00 [2.51]	2	8000 [3775]	300 [8505]	586 [265.8]	626 [284.0]		
125DAZ	3-60-460	9.6	62	2.8	25	30	30	27.00 [2.51]	2	8000 [3775]	300 [8505]	586 [265.8]	626 [284.0]		
125YAZ	3-60-575	6.1	40	2	16	20	20	27.00 [2.51]	2	8000 [3775]	300 [8505]	586 [265.8]	626 [284.0]		
150CAZ	3-60-208/230	22.4/22.4	149	4.8	56/56	70/70	70/70	32.88 [3.05]	2	8000 [3775]	378 [10716]	650 [294.8]	690 [313.0]		
150DAZ	3-60-460	10.6	75	2.8	27	30	35	32.88 [3.05]	2	8000 [3775]	378 [10716]	650 [294.8]	690 [313.0]		
150YAZ	3-60-575	7.7	54	2	20	25	25	32.88 [3.05]	2	8000 [3775]	378 [10716]	650 [294.8]	690 [313.0]		
180CAZ	3-60-208/230	25/25	164	7.2	64/64	70/70	80/80	40.38 [3.75]	2	12000 [5663]	506 [14345]	746 [338.4]	786 [356.5]		
180DAZ	3-60-460	12.2	100	4.2	32	35	40	40.38 [3.75]	2	12000 [5663]	506 [14345]	746 [338.4]	786 [356.5]		
180YAZ	3-60-575	9	78	3	24	30	30	40.38 [3.75]	2	12000 [5663]	506 [14345]	746 [338.4]	786 [356.5]		
240CAZ	3-60-208/230	33.3/33.3	239	7.2	83/83	100/100	110/110	40.38 [3.75]	3	12000 [5663]	655 [18569]	992 [431.8]	992 [450.0]		
240DAZ	3-60-460	17.9	125	3.3	44	50	60	40.38 [3.75]	3	12000 [5663]	655 [18569]	992 [431.8]	992 [450.0]		
240YAZ	3-60-575	12.8	80	2.4	32	35	40	40.38 [3.75]	3	12000 [5663]	655 [18569]	992 [431.8]	992 [450.0]		

[] Designates Metric Conversions

COOLING PERFORMANCE DATA

CONDENSING
UNIT

RAWL-120

WITH
COOLING
COIL

RHGL-120

ENTERING INDOOR AIR @ 80°F [26.7°C] dbE ①											
wbE		71°F [21.7°C]			67°F [19.4°C]			63°F [17.2°C]			
CFM [L/s]		4560 [2152]	3800 [1793]	3040 [1435]	4560 [2152]	3800 [1793]	3040 [1435]	4560 [2152]	3800 [1793]	3040 [1435]	
DR ①		.05	.08	.13	.05	.08	.13	.05	.08	.13	
OUTDOOR DRY BULB TEMPERATURE °F [°C]	75 [23.9]	Total BTUH [kW] Sens BTUH [kW] Power	146.6 [42.96] 94.5 [27.70] 7.7	141.5 [41.47] 81.3 [23.83] 7.6	136.3 [39.95] 69.0 [20.22] 7.5	140.6 [41.21] 112.1 [32.85] 7.6	135.6 [39.74] 97.5 [28.57] 7.5	130.7 [38.30] 84.0 [24.62] 7.4	136.0 [39.86] 127.9 [37.48] 7.5	131.2 [38.45] 112.2 [32.88] 7.4	126.4 [37.04] 97.4 [28.55] 7.3
	80 [26.7]	Total BTUH [kW] Sens BTUH [kW] Power	143.1 [41.94] 92.6 [27.14] 8.1	138.1 [40.47] 79.7 [23.36] 8.0	133.0 [38.98] 67.6 [19.81] 7.8	137.1 [40.18] 110.2 [32.30] 8.0	132.2 [38.74] 95.9 [28.11] 7.9	127.4 [37.34] 82.6 [24.21] 7.7	132.5 [38.83] 126.1 [36.96] 7.9	127.8 [37.45] 110.6 [32.41] 7.8	123.2 [36.11] 96.1 [28.16] 7.6
	85 [29.4]	Total BTUH [kW] Sens BTUH [kW] Power	139.5 [40.88] 90.6 [26.55] 8.5	134.6 [39.45] 78.0 [22.86] 8.3	129.7 [38.01] 66.3 [19.43] 8.2	133.5 [39.12] 108.2 [31.71] 8.4	128.8 [37.75] 94.3 [27.64] 8.2	124.1 [36.37] 81.2 [23.80] 8.1	128.9 [37.78] 124.1 [36.37] 8.3	124.4 [36.46] 109.0 [31.94] 8.1	119.9 [35.14] 94.7 [27.75] 8.0
	90 [32.2]	Total BTUH [kW] Sens BTUH [kW] Power	135.9 [39.83] 88.9 [26.05] 8.9	131.1 [38.42] 76.5 [22.42] 8.7	126.4 [37.04] 65.1 [19.08] 8.6	129.9 [38.07] 106.5 [31.21] 8.8	125.3 [36.72] 92.8 [27.20] 8.6	120.7 [35.37] 80.0 [23.45] 8.5	125.3 [36.72] 122.3 [35.84] 8.7	120.9 [35.43] 107.5 [31.51] 8.5	116.5 [34.14] 93.5 [27.40] 8.4
	95 [35]	Total BTUH [kW] Sens BTUH [kW] Power	132.2 [38.74] 87.0 [25.50] 9.3	127.6 [37.40] 75.0 [21.98] 9.2	122.9 [36.02] 63.7 [18.67] 9.0	126.2 [36.99] 104.6 [30.66] 9.2	121.8 [35.70] 91.3 [26.76] 9.1	117.3 [34.38] 78.7 [23.06] 8.9	121.6 [35.64] 120.5 [35.32] 9.1	117.3 [34.38] 105.9 [31.04] 9.0	113.1 [33.15] 92.2 [27.02] 8.8
	100 [37.8]	Total BTUH [kW] Sens BTUH [kW] Power	128.5 [37.66] 85.3 [25.00] 9.8	124.0 [36.34] 73.5 [21.54] 9.6	119.5 [35.02] 62.6 [18.35] 9.4	122.5 [35.90] 102.9 [30.16] 9.7	118.2 [34.64] 89.8 [26.32] 9.5	113.9 [33.38] 77.5 [22.71] 9.3	117.9 [34.55] 117.9 [34.55] 9.6	113.7 [33.32] 104.4 [30.60] 9.4	109.6 [32.12] 90.9 [26.64] 9.2
	105 [40.6]	Total BTUH [kW] Sens BTUH [kW] Power	124.7 [36.55] 83.5 [24.47] 10.2	120.3 [35.26] 72.0 [21.10] 10.1	116.0 [34.00] 61.4 [17.99] 9.9	118.7 [34.79] 101.1 [29.63] 10.1	114.5 [33.56] 88.3 [25.88] 10.0	110.4 [32.36] 76.3 [22.36] 9.8	114.1 [33.44] 114.1 [33.44] 10.0	110.1 [32.27] 103.0 [30.19] 9.9	106.1 [31.09] 89.8 [26.32] 9.7
	110 [43.3]	Total BTUH [kW] Sens BTUH [kW] Power	120.9 [35.43] 81.8 [23.97] 10.7	116.6 [34.17] 70.5 [20.66] 10.5	112.4 [32.94] 60.1 [17.61] 10.4	114.8 [33.64] 99.3 [29.10] 10.6	110.8 [32.47] 86.8 [25.44] 10.4	106.8 [31.30] 75.1 [22.01] 10.3	110.3 [32.33] 110.3 [32.33] 10.5	106.4 [31.18] 101.5 [29.75] 10.3	102.5 [30.04] 88.5 [25.94] 10.2
	115 [46.1]	Total BTUH [kW] Sens BTUH [kW] Power	117.0 [34.29] 80.0 [23.45] 11.3	112.9 [33.09] 69.1 [20.25] 11.1	108.8 [31.89] 58.9 [17.26] 10.9	111.0 [32.53] 97.7 [28.63] 11.1	107.1 [31.39] 85.5 [25.06] 11.0	103.2 [30.24] 74.0 [21.69] 10.8	106.4 [31.18] 106.4 [31.18] 11.0	102.7 [30.10] 100.1 [29.34] 10.9	98.9 [28.98] 87.3 [25.59] 10.7

CONDENSING
UNIT

RAWL-120

WITH
COOLING
COIL

RCCL-D5013

ENTERING INDOOR AIR @ 80°F [26.7°C] dbE ①											
wbE		71°F [21.7°C]			67°F [19.4°C]			63°F [17.2°C]			
CFM [L/s]		4560 [2152]	3800 [1793]	3040 [1435]	4560 [2152]	3800 [1793]	3040 [1435]	4560 [2152]	3800 [1793]	3040 [1435]	
DR ①		.05	.09	.14	.05	.09	.14	.05	.09	.14	
OUTDOOR DRY BULB TEMPERATURE °F [°C]	75 [23.9]	Total BTUH [kW] Sens BTUH [kW] Power	147.6 [43.26] 94.5 [27.70] 7.8	142.4 [41.73] 81.2 [23.80] 7.7	137.3 [40.24] 69.0 [20.22] 7.6	141.6 [41.50] 112.1 [32.85] 7.7	136.6 [40.03] 97.5 [28.57] 7.6	131.6 [38.57] 83.9 [24.59] 7.5	137.0 [40.15] 127.9 [37.48] 7.6	132.2 [38.74] 112.2 [32.88] 7.5	127.4 [37.34] 97.4 [28.55] 7.4
	80 [26.7]	Total BTUH [kW] Sens BTUH [kW] Power	144.1 [42.23] 92.6 [27.14] 8.2	139.0 [40.74] 79.6 [23.33] 8.1	134.0 [39.27] 67.6 [19.81] 7.9	138.1 [40.47] 110.2 [32.30] 8.1	133.2 [39.04] 95.9 [28.11] 8.0	128.4 [37.63] 82.6 [24.21] 7.8	133.5 [39.12] 126.1 [36.96] 8.0	128.8 [37.75] 110.6 [32.41] 7.9	124.1 [36.37] 96.0 [28.13] 7.7
	85 [29.4]	Total BTUH [kW] Sens BTUH [kW] Power	140.5 [41.18] 90.6 [26.55] 8.6	135.6 [39.74] 78.0 [22.86] 8.4	130.7 [38.30] 66.3 [19.43] 8.3	134.5 [39.42] 108.2 [31.71] 8.5	129.8 [38.04] 94.3 [27.64] 8.3	125.1 [36.66] 81.2 [23.80] 8.2	129.9 [38.07] 124.1 [36.37] 8.4	125.4 [36.75] 109.0 [31.94] 8.2	120.8 [35.40] 94.7 [27.75] 8.1
	90 [32.2]	Total BTUH [kW] Sens BTUH [kW] Power	136.9 [40.12] 88.9 [26.05] 9.0	132.1 [38.71] 76.5 [22.42] 8.8	127.3 [37.31] 65.0 [19.05] 8.7	130.9 [38.36] 106.5 [31.21] 8.9	126.3 [37.01] 92.8 [27.20] 8.7	121.7 [35.67] 80.0 [23.45] 8.6	126.3 [37.01] 122.3 [35.84] 8.8	121.9 [35.73] 107.5 [31.51] 8.6	117.4 [34.41] 93.4 [27.37] 8.5
	95 [35]	Total BTUH [kW] Sens BTUH [kW] Power	133.2 [39.04] 87.0 [25.50] 9.4	128.6 [37.69] 75.0 [21.98] 9.3	123.9 [36.31] 63.7 [18.67] 9.1	127.2 [37.28] 104.6 [30.66] 9.3	122.7 [35.96] 91.2 [26.73] 9.1	118.3 [34.67] 78.7 [23.06] 9.0	122.6 [35.93] 120.5 [35.32] 9.2	118.3 [34.67] 105.9 [31.04] 9.0	114.0 [33.41] 92.1 [26.99] 8.9
	100 [37.8]	Total BTUH [kW] Sens BTUH [kW] Power	129.5 [37.95] 85.3 [25.00] 9.9	125.0 [36.63] 73.5 [21.54] 9.7	120.4 [35.29] 62.5 [18.32] 9.5	123.5 [36.19] 102.9 [30.16] 9.8	119.1 [34.90] 89.7 [26.29] 9.6	114.8 [33.64] 77.4 [22.68] 9.4	118.9 [34.85] 118.7 [34.79] 9.7	114.7 [33.62] 104.4 [30.60] 9.5	110.6 [32.41] 90.9 [26.64] 9.3
	105 [40.6]	Total BTUH [kW] Sens BTUH [kW] Power	125.7 [36.84] 83.5 [24.47] 10.3	121.3 [35.55] 72.0 [21.10] 10.2	116.9 [34.26] 61.3 [17.97] 10.0	119.7 [35.08] 101.1 [29.63] 10.2	115.5 [33.85] 88.3 [25.88] 10.1	111.3 [32.62] 76.3 [22.36] 9.9	115.1 [33.73] 115.1 [33.73] 10.1	111.1 [32.56] 103.0 [30.19] 10.0	107.0 [31.36] 89.7 [26.29] 9.8
	110 [43.3]	Total BTUH [kW] Sens BTUH [kW] Power	121.9 [35.73] 81.8 [23.97] 10.8	117.6 [34.47] 70.5 [20.66] 10.6	113.3 [33.20] 60.0 [17.58] 10.5	115.9 [33.97] 99.4 [29.13] 10.7	111.8 [32.77] 86.8 [25.44] 10.5	107.7 [31.56] 75.0 [21.98] 10.4	111.3 [32.62] 111.3 [32.62] 10.6	107.4 [31.48] 101.5 [29.75] 10.4	103.5 [30.33] 88.5 [25.94] 10.3
	115 [46.1]	Total BTUH [kW] Sens BTUH [kW] Power	118.0 [34.58] 80.0 [23.45] 11.4	113.9 [33.38] 69.1 [20.25] 11.2	109.7 [32.15] 58.8 [17.23] 11.0	112.0 [32.82] 97.7 [28.63] 11.2	108.0 [31.65] 85.4 [25.03] 11.1	104.1 [30.51] 73.9 [21.66] 10.9	107.4 [31.48] 107.4 [31.48] 11.1	103.6 [30.36] 100.0 [29.31] 11.0	99.9 [29.28] 87.3 [25.59] 10.8

DR —Depression ratio
dbE—Entering air dry bulb
wbE—Entering air wet bulb

Total —Total capacity x 1000 BTUH
Sens —Sensible capacity x 1000 BTUH
Power—KW input

NOTES:

- ① When the entering air dry bulb is other than 80°F [27°C], adjust the sensible capacity from the table by adding $[1.10 \times \text{CFM} \times (1 - \text{DR}) \times (\text{dbE} - 80)]$.
- ② Data includes 25 feet [7.62 m] of recommended suction/liquid lines.

[] Designates Metric Conversions

COOLING PERFORMANCE DATA

CONDENSING UNIT **RAWL-125** WITH AIR HANDLER **RHGL-120**

ENTERING INDOOR AIR @ 80°F [26.7°C] dbE ①										
wbE		71°F [21.7°C]			67°F [19.4°C]			63°F [17.2°C]		
CFM [L/s]		4560 [2152]	3800 [1793]	3040 [1435]	4560 [2152]	3800 [1793]	3040 [1435]	4560 [2152]	3800 [1793]	3040 [1435]
DR ①		.03	.07	.11	.03	.07	.11	.03	.07	.11
OUTDOOR DRY BULB TEMPERATURE °F [°C]	75 [23.9]	Total BTUH [kW] Sens BTUH [kW] Power	145.7 [42.70] 95.2 [27.90] 7.4	140.6 [41.21] 82.0 [24.03] 7.3	135.5 [39.71] 69.7 [20.43] 7.2	140.4 [41.15] 112.8 [33.06] 7.4	135.5 [39.71] 98.3 [28.81] 7.2	130.5 [38.25] 84.6 [24.79] 7.1	139.2 [40.80] 131.3 [38.48] 7.3	129.5 [37.95] 100.1 [29.34] 7.1
	80 [26.7]	Total BTUH [kW] Sens BTUH [kW] Power	141.6 [41.50] 93.2 [27.31] 7.8	136.6 [40.03] 80.2 [23.50] 7.7	131.6 [38.57] 68.2 [19.99] 7.6	136.3 [39.95] 110.6 [32.41] 7.8	131.5 [38.54] 96.4 [28.25] 7.6	126.7 [37.13] 83.1 [24.35] 7.5	135.1 [39.59] 129.2 [37.86] 7.7	125.6 [36.81] 98.6 [28.90] 7.4
	85 [29.4]	Total BTUH [kW] Sens BTUH [kW] Power	137.6 [40.33] 91.1 [26.70] 8.3	132.8 [38.92] 78.5 [23.01] 8.1	128.0 [37.51] 66.8 [19.58] 8.0	132.4 [38.80] 108.7 [31.86] 8.2	127.7 [37.43] 94.7 [27.75] 8.0	123.1 [36.08] 81.7 [23.94] 7.9	131.2 [38.45] 127.3 [37.31] 8.1	122.0 [35.75] 97.2 [28.49] 7.8
	90 [32.2]	Total BTUH [kW] Sens BTUH [kW] Power	133.9 [39.24] 89.2 [26.14] 8.7	129.2 [37.86] 76.9 [22.54] 8.6	124.5 [36.49] 65.5 [19.20] 8.4	128.7 [37.72] 106.9 [31.33] 8.6	124.1 [36.37] 93.2 [27.31] 8.5	119.6 [35.05] 80.4 [23.56] 8.3	127.5 [37.37] 125.4 [36.75] 8.6	118.5 [34.73] 95.8 [28.08] 8.3
	95 [35]	Total BTUH [kW] Sens BTUH [kW] Power	130.4 [38.22] 87.6 [25.67] 9.2	125.9 [36.90] 75.6 [22.16] 9.0	121.3 [35.55] 64.4 [18.87] 8.9	125.1 [36.66] 105.1 [30.80] 9.1	120.8 [35.40] 91.8 [26.90] 9.0	116.4 [34.11] 79.2 [23.21] 8.8	124.0 [36.34] 123.7 [36.25] 9.1	115.3 [33.79] 94.7 [27.75] 8.7
	100 [37.8]	Total BTUH [kW] Sens BTUH [kW] Power	127.1 [37.25] 85.9 [25.17] 9.7	122.7 [35.96] 74.2 [21.75] 9.5	118.2 [34.64] 63.2 [18.52] 9.3	121.9 [35.73] 103.6 [30.36] 9.6	117.6 [34.47] 90.5 [26.52] 9.5	113.3 [33.20] 78.2 [22.92] 9.3	120.7 [35.37] 120.7 [35.37] 9.6	112.2 [32.88] 93.6 [27.43] 9.2
	105 [40.6]	Total BTUH [kW] Sens BTUH [kW] Power	124.1 [36.37] 84.6 [24.79] 10.2	119.7 [35.08] 73.0 [21.39] 10.0	115.3 [33.79] 62.2 [18.23] 9.9	118.8 [34.82] 102.2 [29.95] 10.2	114.6 [33.59] 89.3 [26.17] 10.0	110.4 [32.36] 77.2 [22.63] 9.8	117.6 [34.47] 117.6 [34.47] 10.1	109.3 [32.03] 92.6 [27.14] 9.7
	110 [43.3]	Total BTUH [kW] Sens BTUH [kW] Power	121.2 [35.52] 83.4 [24.44] 10.8	116.9 [34.26] 72.0 [21.10] 10.6	112.7 [33.03] 61.5 [18.02] 10.4	115.9 [33.97] 100.9 [29.57] 10.7	111.8 [32.77] 88.2 [25.85] 10.5	107.8 [31.59] 76.3 [22.36] 10.3	114.7 [33.62] 114.7 [33.62] 10.6	106.7 [31.27] 91.8 [26.90] 10.3
	115 [46.1]	Total BTUH [kW] Sens BTUH [kW] Power	118.5 [34.73] 82.2 [24.09] 11.4	114.3 [33.50] 71.0 [20.81] 11.2	110.2 [32.30] 60.7 [17.79] 11.0	113.2 [33.18] 99.7 [29.22] 11.3	109.2 [32.00] 87.2 [25.56] 11.1	105.3 [30.86] 75.5 [22.13] 10.9	112.0 [32.82] 112.0 [32.82] 11.2	104.2 [30.54] 91.0 [26.67] 10.8

CONDENSING UNIT **RAWL-125** WITH AIR HANDLER **RCCL-D5013**

ENTERING INDOOR AIR @ 80°F [26.7°C] dbE ①										
wbE		71°F [21.7°C]			67°F [19.4°C]			63°F [17.2°C]		
CFM [L/s]		4560 [2152]	3800 [1793]	3040 [1435]	4560 [2152]	3800 [1793]	3040 [1435]	4560 [2152]	3800 [1793]	3040 [1435]
DR ①		.07	.11	.16	.11	.11	.16	.07	.11	.16
OUTDOOR DRY BULB TEMPERATURE °F [°C]	75 [23.9]	Total BTUH [kW] Sens BTUH [kW] Power	145.7 [42.70] 93.0 [27.26] 7.4	140.5 [41.18] 79.9 [23.42] 7.3	135.4 [39.68] 67.8 [19.87] 7.2	140.4 [41.15] 110.6 [32.41] 7.4	135.4 [39.68] 96.2 [28.19] 7.2	130.5 [38.25] 82.8 [24.27] 7.1	139.2 [40.80] 129.1 [37.84] 7.3	129.4 [37.92] 98.2 [28.78] 7.1
	80 [26.7]	Total BTUH [kW] Sens BTUH [kW] Power	141.5 [41.47] 90.9 [26.64] 7.8	136.6 [40.03] 78.2 [22.92] 7.7	131.6 [38.57] 66.4 [19.46] 7.6	136.2 [39.92] 108.3 [31.74] 7.8	131.5 [38.54] 94.4 [27.67] 7.6	126.7 [37.13] 81.2 [23.80] 7.5	135.1 [39.59] 127.0 [37.22] 7.7	125.6 [36.81] 96.7 [28.34] 7.4
	85 [29.4]	Total BTUH [kW] Sens BTUH [kW] Power	137.6 [40.33] 88.9 [26.05] 8.3	132.8 [38.92] 76.5 [22.42] 8.1	128.0 [37.51] 65.0 [19.05] 8.0	132.3 [38.77] 106.4 [31.18] 8.2	127.7 [37.43] 92.7 [27.17] 8.1	123.0 [36.05] 79.8 [23.39] 7.9	131.2 [38.45] 125.1 [36.66] 8.1	122.0 [35.75] 95.4 [27.96] 7.9
	90 [32.2]	Total BTUH [kW] Sens BTUH [kW] Power	133.9 [39.24] 87.0 [25.50] 8.7	129.2 [37.86] 74.9 [21.95] 8.6	124.5 [36.49] 63.6 [18.64] 8.4	128.6 [37.69] 104.6 [30.66] 8.7	124.1 [36.37] 91.2 [26.73] 8.5	119.6 [35.05] 78.6 [23.04] 8.3	127.5 [37.37] 123.2 [36.11] 8.6	118.5 [34.73] 94.0 [27.55] 8.3
	95 [35]	Total BTUH [kW] Sens BTUH [kW] Power	130.4 [38.22] 85.4 [25.03] 9.2	125.8 [36.87] 73.5 [21.54] 9.0	121.3 [35.55] 62.6 [18.35] 8.9	125.1 [36.66] 102.9 [30.16] 9.1	120.7 [35.37] 89.7 [26.29] 9.0	116.3 [34.08] 77.3 [22.65] 8.8	124.0 [36.34] 121.5 [35.61] 9.1	115.3 [33.79] 92.8 [27.20] 8.8
	100 [37.8]	Total BTUH [kW] Sens BTUH [kW] Power	127.1 [37.25] 83.7 [24.53] 9.7	122.7 [35.96] 72.2 [21.16] 9.5	118.2 [34.64] 61.4 [17.99] 9.4	121.8 [35.70] 101.4 [29.72] 9.6	117.6 [34.47] 88.5 [25.94] 9.5	113.3 [33.20] 76.3 [22.36] 9.3	120.7 [35.37] 119.9 [35.14] 9.6	112.2 [32.88] 91.8 [26.90] 9.2
	105 [40.6]	Total BTUH [kW] Sens BTUH [kW] Power	124.0 [36.34] 82.3 [24.12] 10.2	119.7 [35.08] 71.0 [20.81] 10.0	115.3 [33.79] 60.4 [17.70] 9.9	118.7 [34.79] 99.9 [29.28] 10.2	114.6 [33.59] 87.3 [25.59] 10.0	110.4 [32.36] 75.3 [22.07] 9.8	117.6 [34.47] 117.6 [34.47] 10.1	109.3 [32.03] 90.8 [26.61] 9.8
	110 [43.3]	Total BTUH [kW] Sens BTUH [kW] Power	121.1 [35.49] 81.1 [23.77] 10.8	116.9 [34.26] 70.0 [20.51] 10.6	112.6 [33.00] 59.6 [17.47] 10.4	115.9 [33.97] 98.7 [28.93] 10.7	111.8 [32.77] 86.2 [25.26] 10.5	107.7 [31.56] 74.4 [21.80] 10.3	114.7 [33.62] 114.7 [33.62] 10.7	106.6 [31.24] 89.9 [26.35] 10.3
	115 [46.1]	Total BTUH [kW] Sens BTUH [kW] Power	118.5 [34.73] 80.0 [23.45] 11.4	114.3 [33.50] 69.0 [20.22] 11.2	110.2 [32.30] 58.8 [17.23] 11.0	113.2 [33.18] 97.5 [28.57] 11.3	109.2 [32.00] 85.2 [24.97] 11.1	105.2 [30.83] 73.6 [21.57] 10.9	112.0 [32.82] 112.0 [32.82] 11.2	104.2 [30.54] 89.2 [26.14] 10.8

DR —Depression ratio
dbE—Entering air dry bulb
wbE—Entering air wet bulb

Total —Total capacity x 1000 BTUH
Sens —Sensible capacity x 1000 BTUH
Power—KW input

NOTES:
① When the entering air dry bulb is other than 80°F [27°C], adjust the sensible capacity from the table by adding $[1.10 \times \text{CFM} \times (1 - \text{DR}) \times (\text{dbE} - 80)]$.
② Data includes 25 feet [7.62 m] of recommended suction/liquid lines.

[] Designates Metric Conversions

COOLING PERFORMANCE DATA

CONDENSING
UNIT

RAWL-150

WITH
COOLING
COIL

RHGL-180

ENTERING INDOOR AIR @ 80°F [26.7°C] dbE ①											
wbE		71°F [21.7°C]			67°F [19.4°C]			63°F [17.2°C]			
CFM [L/s]		6000 [2832]	5000 [2360]	4000 [1888]	6000 [2832]	5000 [2360]	4000 [1888]	6000 [2832]	5000 [2360]	4000 [1888]	
DR ①		.06	.01	.14	.06	.01	.14	.06	.01	.14	
OUTDOOR DRY BULB TEMPERATURE °F [°C]	75 [23.9]	Total BTUH [kW] Sens BTUH [kW] Power	159.8 [46.8] 108.4 [31.8] 10.5	154.2 [45.2] 93.5 [27.4] 10.3	148.6 [43.6] 79.7 [23.4] 10.1	164.1 [48.1] 135.8 [39.8] 11.5	158.3 [46.4] 118.4 [34.7] 11.3	152.6 [44.7] 102.2 [30.0] 11.1	157.5 [46.2] 151.0 [44.3] 12.4	152.0 [44.5] 132.6 [38.9] 12.2	146.5 [42.9] 115.2 [33.8] 12.0
	80 [26.7]	Total BTUH [kW] Sens BTUH [kW] Power	159.9 [46.9] 108.8 [31.9] 11.1	154.3 [45.2] 93.9 [27.5] 10.9	148.7 [43.6] 80.1 [23.5] 10.7	164.2 [48.1] 136.2 [39.9] 12.0	158.4 [46.4] 118.8 [34.8] 11.8	152.7 [44.8] 102.5 [30.0] 11.6	157.7 [46.2] 151.5 [44.4] 13.0	152.1 [44.6] 133.0 [39.0] 12.8	146.6 [43.0] 115.6 [33.9] 12.6
	85 [29.4]	Total BTUH [kW] Sens BTUH [kW] Power	159.0 [46.6] 108.6 [31.8] 11.7	153.5 [45.0] 93.8 [27.5] 11.5	147.9 [43.3] 80.0 [23.5] 11.3	163.3 [47.9] 136.0 [39.9] 12.7	157.6 [46.2] 118.7 [34.8] 12.5	151.9 [44.5] 102.5 [30.0] 12.2	156.8 [46.0] 151.3 [44.4] 13.7	151.3 [44.3] 132.9 [39.0] 13.4	145.8 [42.7] 115.5 [33.9] 13.2
	90 [32.2]	Total BTUH [kW] Sens BTUH [kW] Power	157.2 [46.1] 107.7 [31.6] 12.4	151.7 [44.5] 93.0 [27.3] 12.1	146.1 [42.8] 79.2 [23.2] 11.9	161.4 [47.3] 135.0 [39.6] 13.3	155.8 [45.7] 117.9 [34.6] 13.1	150.1 [44.0] 101.7 [29.8] 12.9	154.9 [45.4] 150.3 [44.1] 14.3	149.5 [43.8] 132.1 [38.7] 14.1	144.0 [42.2] 114.8 [33.7] 13.8
	95 [35]	Total BTUH [kW] Sens BTUH [kW] Power	154.3 [45.2] 106.1 [31.1] 13.1	148.9 [43.6] 91.6 [26.9] 12.8	143.5 [42.1] 78.2 [22.9] 12.6	158.6 [46.5] 133.5 [39.1] 14.0	153.0 [44.8] 116.5 [34.2] 13.8	147.5 [43.2] 100.6 [29.5] 13.5	152.0 [44.5] 148.7 [43.6] 15.0	146.7 [43.0] 130.7 [38.3] 14.8	141.4 [41.4] 113.7 [33.3] 14.5
	100 [37.8]	Total BTUH [kW] Sens BTUH [kW] Power	150.5 [44.1] 103.8 [30.4] 13.8	145.2 [42.6] 89.6 [26.3] 13.5	139.9 [41.0] 76.4 [22.4] 13.3	154.7 [45.3] 131.1 [38.4] 14.8	149.3 [43.8] 114.5 [33.6] 14.5	143.9 [42.2] 98.9 [29.0] 14.3	148.2 [43.4] 146.4 [42.9] 15.7	143.0 [41.9] 128.7 [37.7] 15.5	137.8 [40.4] 112.0 [32.8] 15.2
	105 [40.6]	Total BTUH [kW] Sens BTUH [kW] Power	145.6 [42.7] 100.7 [29.5] 14.6	140.5 [41.2] 87.0 [25.5] 14.3	135.4 [39.7] 74.3 [21.8] 14.1	149.9 [43.9] 128.1 [37.6] 15.5	144.6 [42.4] 111.9 [32.8] 15.3	139.4 [40.9] 96.7 [28.3] 15.0	143.3 [42.0] 143.3 [42.0] 16.5	138.3 [40.5] 126.1 [37.0] 16.2	133.3 [39.1] 109.8 [32.2] 15.9
	110 [43.3]	Total BTUH [kW] Sens BTUH [kW] Power	139.8 [41.0] 97.1 [28.5] 15.4	134.9 [39.5] 83.9 [24.6] 15.1	130.0 [38.1] 71.6 [21.0] 14.8	144.1 [42.2] 124.4 [36.5] 16.4	139.0 [40.7] 108.7 [31.9] 16.1	133.9 [39.2] 93.9 [27.5] 15.8	137.5 [40.3] 137.5 [40.3] 17.3	132.7 [38.9] 123.0 [36.1] 17.0	127.9 [37.5] 107.2 [31.4] 16.7
	115 [46.1]	Total BTUH [kW] Sens BTUH [kW] Power	133.0 [39.0] 92.7 [27.2] 16.2	128.3 [37.6] 80.1 [23.5] 15.9	123.6 [36.2] 68.4 [20.1] 15.7	137.2 [40.2] 119.9 [35.1] 17.2	132.4 [38.8] 104.9 [30.8] 16.9	127.6 [37.4] 90.8 [26.6] 16.6	130.7 [38.3] 130.7 [38.3] 18.2	126.1 [37.0] 119.1 [34.9] 17.9	121.5 [35.6] 103.8 [30.4] 17.6

CONDENSING
UNIT

RAWL-180

WITH
COOLING
COIL

RHGL-180

ENTERING INDOOR AIR @ 80°F [26.7°C] dbE ①											
wbE		71°F [21.7°C]			67°F [19.4°C]			63°F [17.2°C]			
CFM [L/s]		6120 [2888]	5100 [2407]	4080 [1926]	6120 [2888]	5100 [2407]	4080 [1926]	6120 [2888]	5100 [2407]	4080 [1926]	
DR ①		.01	.07	.14	.01	.07	.14	.01	.07	.14	
OUTDOOR DRY BULB TEMPERATURE °F [°C]	75 [23.9]	Total BTUH [kW] Sens BTUH [kW] Power	238.4 [69.9] 148.4 [43.5] 15.8	230.0 [67.4] 127.3 [37.3] 15.6	221.6 [64.9] 107.8 [31.6] 15.3	217.6 [63.8] 164.2 [48.1] 14.5	210.0 [61.5] 142.6 [41.8] 14.2	202.4 [59.3] 122.4 [35.9] 14.0	210.9 [61.8] 180.8 [53.0] 13.1	203.5 [59.6] 158.0 [46.3] 12.9	196.1 [57.5] 136.5 [40.0] 12.6
	80 [26.7]	Total BTUH [kW] Sens BTUH [kW] Power	232.3 [68.1] 145.6 [42.7] 16.4	224.1 [65.7] 125.0 [36.6] 16.1	216.0 [63.3] 106.0 [31.1] 15.9	211.5 [62.0] 161.5 [47.3] 15.0	204.1 [59.8] 140.3 [41.1] 14.8	196.7 [57.6] 120.5 [35.3] 14.5	204.8 [60.0] 178.1 [52.2] 13.7	197.6 [57.9] 155.7 [45.6] 13.4	190.4 [55.8] 134.6 [39.5] 13.2
	85 [29.4]	Total BTUH [kW] Sens BTUH [kW] Power	226.4 [66.4] 142.9 [41.9] 17.0	218.5 [64.0] 122.8 [36.0] 16.7	210.5 [61.7] 104.1 [30.5] 16.4	205.7 [60.3] 158.8 [46.5] 15.7	198.5 [58.2] 138.0 [40.5] 15.4	191.2 [56.0] 118.5 [34.7] 15.1	198.9 [58.3] 175.3 [51.4] 14.3	192.0 [56.3] 153.4 [45.0] 14.0	185.0 [54.2] 132.7 [38.9] 13.8
	90 [32.2]	Total BTUH [kW] Sens BTUH [kW] Power	220.8 [64.7] 140.1 [41.1] 17.7	213.0 [62.4] 120.3 [35.3] 17.4	205.3 [60.2] 102.1 [29.9] 17.1	200.0 [58.6] 155.9 [45.7] 16.3	193.0 [56.6] 135.6 [39.8] 16.0	186.0 [54.5] 116.6 [34.2] 15.7	193.3 [56.7] 172.5 [50.6] 14.9	186.5 [54.7] 151.0 [44.3] 14.7	179.7 [52.7] 130.7 [38.3] 14.4
	95 [35]	Total BTUH [kW] Sens BTUH [kW] Power	215.3 [63.1] 137.1 [40.2] 18.4	207.8 [60.9] 117.9 [34.6] 18.1	200.2 [58.7] 100.0 [29.3] 17.7	194.6 [57.0] 153.1 [44.9] 17.0	187.7 [55.0] 133.1 [39.0] 16.7	180.9 [53.0] 114.5 [33.6] 16.4	187.8 [55.0] 169.6 [49.7] 15.6	181.2 [53.1] 148.5 [43.5] 15.4	174.7 [51.2] 128.7 [37.7] 15.1
	100 [37.8]	Total BTUH [kW] Sens BTUH [kW] Power	210.1 [61.6] 134.2 [39.3] 19.1	202.7 [59.4] 115.3 [33.8] 18.8	195.3 [57.2] 97.8 [28.7] 18.4	189.3 [55.5] 150.0 [44.0] 17.7	182.7 [53.5] 130.6 [38.3] 17.4	176.1 [51.6] 112.4 [33.0] 17.1	182.6 [53.5] 166.5 [48.8] 16.4	176.2 [51.6] 145.9 [42.8] 16.1	169.8 [49.8] 126.5 [37.1] 15.8
	105 [40.6]	Total BTUH [kW] Sens BTUH [kW] Power	205.1 [60.1] 131.1 [38.4] 19.9	197.9 [58.0] 112.7 [33.0] 19.5	190.7 [55.9] 95.7 [28.1] 19.2	184.3 [54.0] 146.9 [43.1] 18.5	177.9 [52.1] 128.0 [37.5] 18.2	171.4 [50.2] 110.2 [32.3] 17.9	177.6 [52.0] 163.5 [47.9] 17.1	171.4 [50.2] 143.3 [42.0] 16.8	165.1 [48.4] 124.2 [36.4] 16.5
	110 [43.3]	Total BTUH [kW] Sens BTUH [kW] Power	200.3 [58.7] 127.9 [37.5] 20.7	193.3 [56.7] 110.0 [32.2] 20.3	186.2 [54.6] 93.3 [27.4] 20.0	179.5 [52.6] 143.8 [42.2] 19.3	173.2 [50.8] 125.2 [36.7] 19.0	166.9 [48.9] 107.8 [31.6] 18.6	172.8 [50.6] 160.4 [47.0] 17.9	166.7 [48.9] 140.6 [41.2] 17.6	160.7 [47.1] 122.0 [35.8] 17.3
	115 [46.1]	Total BTUH [kW] Sens BTUH [kW] Power	195.7 [57.4] 124.6 [36.5] 21.5	188.8 [55.3] 107.1 [31.4] 21.1	182.0 [53.3] 90.9 [26.7] 20.8	175.0 [51.3] 140.6 [41.2] 20.1	168.8 [49.5] 122.4 [35.9] 19.8	162.7 [47.7] 105.4 [30.9] 19.4	168.2 [49.3] 157.1 [46.1] 18.8	162.3 [47.6] 137.8 [40.4] 18.4	156.4 [45.8] 119.6 [35.1] 18.1

DR —Depression ratio

dbE—Entering air dry bulb

wbE—Entering air wet bulb

Total —Total capacity x 1000 BTUH

Sens —Sensible capacity x 1000 BTUH

Power—kW input

NOTES:

① When the entering air dry bulb is other than 80°F [27°C], adjust the sensible capacity from the table by adding $[1.10 \times \text{CFM} \times (1 - \text{DR}) \times (\text{dbE} - 80)]$.

② Data includes 25 feet [7.62 m] of recommended suction/liquid lines.

[] Designates Metric Conversions

COOLING PERFORMANCE DATA

CONDENSING UNIT **RAWL-180**

WITH AIR HANDLER **RHGL-240**

ENTERING INDOOR AIR @ 80°F [26.7°C] dbE ①											
wbE		71°F [21.7°C]			67°F [19.4°C]			63°F [17.2°C]			
CFM [L/s]		8040 [3794]	6700 [3162]	5360 [2530]	8040 [3794]	6700 [3162]	5360 [2530]	8040 [3794]	6700 [3162]	5360 [2530]	
DR ①		.06	.01	.13	.06	.01	.13	.06	.01	.13	
OUTDOOR DRY BULB TEMPERATURE °F [°C]	75 [23.9]	Total BTUH [kW]	251.1 [73.6]	242.3 [71.0]	233.5 [68.4]	230.4 [67.5]	222.3 [65.1]	214.2 [62.8]	223.7 [65.6]	215.8 [63.2]	208.0 [61.0]
		Sens BTUH [kW]	172.1 [50.4]	148.6 [43.6]	126.8 [37.2]	188.1 [55.1]	163.9 [48.0]	141.3 [41.4]	204.7 [60.0]	179.3 [52.6]	155.5 [45.6]
		Power	16.2	15.9	15.6	14.8	14.6	14.3	13.4	13.2	13.0
	80 [26.7]	Total BTUH [kW]	245.1 [71.8]	236.5 [69.3]	227.9 [66.8]	224.3 [65.7]	216.4 [63.4]	208.6 [61.1]	217.6 [63.8]	209.9 [61.5]	202.3 [59.3]
		Sens BTUH [kW]	169.5 [49.7]	146.4 [42.9]	124.9 [36.6]	185.3 [54.3]	161.6 [47.4]	139.4 [40.9]	201.9 [59.2]	177.0 [51.9]	153.6 [45.0]
		Power	16.8	16.5	16.2	15.4	15.1	14.9	14.0	13.8	13.5
	85 [29.4]	Total BTUH [kW]	239.2 [70.1]	230.8 [67.6]	222.4 [65.2]	218.4 [64.0]	210.8 [61.8]	203.1 [59.5]	211.7 [62.0]	204.3 [59.9]	196.8 [57.7]
		Sens BTUH [kW]	166.7 [48.9]	144.1 [42.2]	123.0 [36.1]	182.5 [53.5]	159.3 [46.7]	137.4 [40.3]	199.1 [58.4]	174.7 [51.2]	151.6 [44.4]
		Power	17.4	17.1	16.8	16.0	15.7	15.5	14.6	14.4	14.1
	90 [32.2]	Total BTUH [kW]	233.5 [68.4]	225.3 [66.0]	217.1 [63.6]	212.8 [62.4]	205.3 [60.2]	197.9 [58.0]	206.0 [60.4]	198.8 [58.3]	191.6 [56.2]
Sens BTUH [kW]		163.8 [48.0]	141.6 [41.5]	120.9 [35.4]	179.7 [52.7]	156.9 [46.0]	135.5 [39.7]	196.3 [57.5]	172.3 [50.5]	149.7 [43.9]	
Power		18.0	17.7	17.4	16.7	16.4	16.1	15.3	15.0	14.8	
95 [35]	Total BTUH [kW]	228.1 [66.8]	220.1 [64.5]	212.1 [62.2]	207.3 [60.8]	200.1 [58.6]	192.8 [56.5]	200.6 [58.8]	193.6 [56.7]	186.5 [54.7]	
	Sens BTUH [kW]	160.9 [47.2]	139.2 [40.8]	119.0 [34.9]	176.8 [51.8]	154.5 [45.3]	133.5 [39.1]	193.4 [56.7]	169.9 [49.8]	147.6 [43.3]	
	Power	18.7	18.4	18.1	17.4	17.1	16.8	16.0	15.7	15.4	
100 [37.8]	Total BTUH [kW]	222.9 [65.3]	215.0 [63.0]	207.2 [60.7]	202.1 [59.2]	195.0 [57.1]	187.9 [55.1]	195.4 [57.3]	188.5 [55.2]	181.7 [53.3]	
	Sens BTUH [kW]	158.0 [46.3]	136.6 [40.0]	116.8 [34.2]	173.8 [50.9]	151.9 [44.5]	131.3 [38.5]	190.4 [55.8]	167.2 [49.0]	145.4 [42.6]	
	Power	19.5	19.1	18.8	18.1	17.8	17.5	16.7	16.4	16.1	
105 [40.6]	Total BTUH [kW]	217.8 [63.8]	210.2 [61.6]	202.6 [59.4]	197.1 [57.8]	190.2 [55.7]	183.3 [53.7]	190.4 [55.8]	183.7 [53.8]	177.0 [51.9]	
	Sens BTUH [kW]	154.8 [45.4]	134.0 [39.3]	114.6 [33.6]	170.8 [50.1]	149.3 [43.8]	129.1 [37.8]	187.3 [54.9]	164.6 [48.2]	143.2 [42.0]	
	Power	20.2	19.9	19.5	18.9	18.5	18.2	17.5	17.2	16.9	
110 [43.3]	Total BTUH [kW]	213.1 [62.5]	205.6 [60.3]	198.1 [58.1]	192.3 [56.4]	185.6 [54.4]	178.8 [52.4]	185.6 [54.4]	179.1 [52.5]	172.6 [50.6]	
	Sens BTUH [kW]	151.8 [44.5]	131.3 [38.5]	112.2 [32.9]	167.6 [49.1]	146.6 [43.0]	126.8 [37.2]	184.2 [54.0]	162.0 [47.5]	141.0 [41.3]	
	Power	21.0	20.7	20.3	19.7	19.3	19.0	18.3	18.0	17.6	
115 [46.1]	Total BTUH [kW]	208.5 [61.1]	201.2 [59.0]	193.8 [56.8]	187.7 [55.0]	181.2 [53.1]	174.6 [51.2]	181.0 [53.0]	174.6 [51.2]	168.3 [49.3]	
	Sens BTUH [kW]	148.5 [43.5]	128.5 [37.7]	109.8 [32.2]	164.3 [48.2]	143.8 [42.2]	124.4 [36.5]	180.9 [53.0]	159.1 [46.6]	138.5 [40.6]	
	Power	21.9	21.5	21.1	20.5	20.1	19.8	19.1	18.8	18.4	

CONDENSING UNIT **RAWL-240**

WITH AIR HANDLER **RHGL-240**

ENTERING INDOOR AIR @ 80°F [26.7°C] dbE ①											
wbE		71°F [21.7°C]			67°F [19.4°C]			63°F [17.2°C]			
CFM [L/s]		8640 [4078]	7200 [3398]	5760 [2718]	8640 [4078]	7200 [3398]	5760 [2718]	8640 [4078]	7200 [3398]	5760 [2718]	
DR ①		.0	.01	.07	.0	.01	.07	.0	.01	.07	
OUTDOOR DRY BULB TEMPERATURE °F [°C]	75 [23.9]	Total BTUH [kW] Sens BTUH [kW] Power	299.6 [87.8] 198.4 [58.2] 17.9	289.1 [84.7] 171.0 [50.1] 17.6	278.6 [81.6] 145.5 [42.7] 17.3	286.3 [83.9] 229.1 [67.2] 17.5	276.3 [81.0] 199.5 [58.5] 17.2	266.2 [78.0] 171.7 [50.3] 16.9	278.9 [81.7] 260.1 [76.2] 17.1	269.2 [78.9] 228.2 [66.9] 16.8	259.4 [76.0] 198.0 [58.0] 16.5
	80 [26.7]	Total BTUH [kW] Sens BTUH [kW] Power	292.6 [85.8] 194.7 [57.1] 18.9	282.3 [82.7] 167.8 [49.2] 18.6	272.0 [79.7] 142.8 [41.9] 18.3	279.3 [81.9] 225.3 [66.0] 18.5	269.5 [79.0] 196.3 [57.5] 18.2	259.7 [76.1] 169.1 [49.6] 17.8	271.9 [79.7] 256.4 [75.2] 18.1	262.4 [76.9] 225.0 [66.0] 17.7	252.8 [74.1] 195.3 [57.2] 17.4
	85 [29.4]	Total BTUH [kW] Sens BTUH [kW] Power	285.4 [83.6] 191.0 [56.0] 20.0	275.4 [80.7] 164.7 [48.3] 19.6	265.4 [77.8] 140.3 [41.1] 19.3	272.2 [79.8] 221.7 [65.0] 19.6	262.6 [77.0] 193.2 [56.6] 19.2	253.1 [74.2] 166.6 [48.8] 18.9	264.8 [77.6] 252.8 [74.1] 19.1	255.5 [74.9] 221.9 [65.0] 18.8	246.2 [72.2] 192.8 [56.5] 18.5
	90 [32.2]	Total BTUH [kW] Sens BTUH [kW] Power	278.1 [81.5] 187.3 [54.9] 21.1	268.3 [78.6] 161.5 [47.3] 20.8	258.6 [75.8] 137.6 [40.3] 20.4	264.8 [77.6] 217.9 [63.9] 20.7	255.5 [74.9] 190.0 [55.7] 20.3	246.2 [72.2] 163.8 [48.0] 20.0	257.4 [75.4] 249.0 [73.0] 20.3	248.4 [72.8] 218.7 [64.1] 19.9	239.4 [70.2] 190.1 [55.7] 19.6
	95 [35]	Total BTUH [kW] Sens BTUH [kW] Power	270.6 [79.3] 183.6 [53.8] 22.3	261.1 [76.5] 158.4 [46.4] 21.9	251.6 [73.7] 135.0 [39.6] 21.5	257.3 [75.4] 214.2 [62.8] 21.9	248.3 [72.8] 186.9 [54.8] 21.5	239.3 [70.1] 161.3 [47.3] 21.1	249.9 [73.2] 245.2 [71.9] 21.5	241.2 [70.7] 215.6 [63.2] 21.1	232.4 [68.1] 187.5 [55.0] 20.7
	100 [37.8]	Total BTUH [kW] Sens BTUH [kW] Power	262.9 [77.0] 179.7 [52.7] 23.6	253.7 [74.4] 155.2 [45.5] 23.2	244.5 [71.7] 132.4 [38.8] 22.8	249.7 [73.2] 210.5 [61.7] 23.2	240.9 [70.6] 183.7 [53.8] 22.8	232.2 [68.1] 158.7 [46.5] 22.4	242.3 [71.0] 241.5 [70.8] 22.7	233.8 [68.5] 212.4 [62.3] 22.3	225.3 [66.0] 184.9 [54.2] 21.9
	105 [40.6]	Total BTUH [kW] Sens BTUH [kW] Power	255.1 [74.8] 176.1 [51.6] 24.9	246.2 [72.2] 152.2 [44.6] 24.5	237.2 [69.5] 129.8 [38.1] 24.1	241.9 [70.9] 206.9 [60.6] 24.5	233.4 [68.4] 180.7 [53.0] 24.1	224.9 [65.9] 156.1 [45.8] 23.6	234.5 [68.7] 234.5 [68.7] 24.1	226.3 [66.3] 209.4 [61.4] 23.6	218.0 [63.9] 182.3 [53.4] 23.2
	110 [43.3]	Total BTUH [kW] Sens BTUH [kW] Power	247.1 [72.4] 172.4 [50.5] 26.3	238.5 [69.9] 149.1 [43.7] 25.9	229.8 [67.3] 127.3 [37.3] 25.4	233.9 [68.5] 203.1 [59.5] 25.9	225.7 [66.1] 177.6 [52.1] 25.4	217.5 [63.7] 153.6 [45.0] 25.0	226.5 [66.4] 226.5 [66.4] 25.5	218.6 [64.1] 206.2 [60.4] 25.0	210.6 [61.7] 179.7 [52.7] 24.6
	115 [46.1]	Total BTUH [kW] Sens BTUH [kW] Power	239.0 [70.0] 168.7 [49.5] 27.8	230.6 [67.6] 145.9 [42.8] 27.3	222.2 [65.1] 124.7 [36.6] 26.8	225.8 [66.2] 199.4 [58.4] 27.3	217.9 [63.9] 174.5 [51.2] 26.9	209.9 [61.5] 151.0 [44.3] 26.4	218.4 [64.0] 218.4 [64.0] 26.9	210.7 [61.8] 203.1 [59.5] 26.5	203.1 [59.5] 177.3 [52.0] 26.0

DR —Depression ratio
dbE—Entering air dry bulb
wbE—Entering air wet bulb

Total —Total capacity x 1000 BTUH
Sens —Sensible capacity x 1000 BTUH
Power—KW input

NOTES:

- ① When the entering air dry bulb is other than 80°F [27°C], adjust the sensible capacity from the table by adding $[1.10 \times \text{CFM} \times (1 - \text{DR}) \times (\text{dbE} - 80)]$.
- ② Data includes 25 feet [7.62 m] of recommended suction/liquid lines.

[] Designates Metric Conversions

RIGGING

ROOFTOP INSTALLATION

If rooftop installation is required, make certain that the building construction is adequate for the weight of the unit. (Refer to physical data chart.) Before placing the unit on the roof, make certain that the nylon rigging slings are of sufficient length to maintain equilibrium of the unit when lifting. Under no circumstances should the unit be lifted by only one corner for rooftop installation.

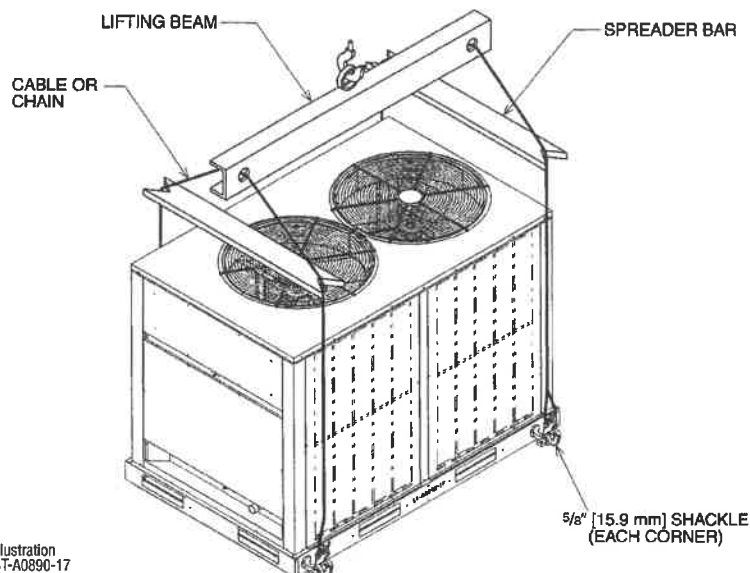


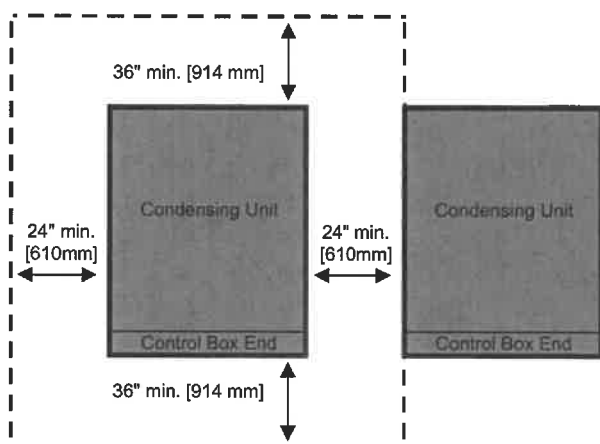
Illustration
ST-A0890-17

GENERAL INSTALLATION

The condensing unit should be installed outdoors. It should be located as near as possible to the evaporator section to keep connecting refrigerant tubing lengths to a minimum. The unit must be installed to allow a free air flow to the condenser coils.

If several units are installed adjacent to each other, care must be taken to avoid recirculation of air from one condenser to another. In all installations, adequate space must be provided for installation and servicing.

CLEARANCES



SLAB INSTALLATION

Condensing units should be set on a solid level foundation. When installed at ground level, the unit should be placed on a cement slab. If the pad is formed at the installation site, do not pour the pad tight against the structure, otherwise vibration will be transmitted from the unit through the pad.

The unit must not be connected to any duct work. Do not locate unit under a roof drip; if necessary, install gutters, etc., to prevent water run-off from hitting the unit. To prevent air recirculation, it is recommended that the unit not be installed under an overhang, but if necessary allow a minimum of 60 inches [1524 mm] above the unit for air discharge.

[] Designates Metric Conversions

GENERAL TERMS OF LIMITED WARRANTY*

Rheem will furnish a replacement for any part of this product which fails in normal use and service within the applicable periods stated, in accordance with the terms of the limited warranty.

Compressor Five (5) Years
Any Other Part.....One (1) Year

*For Complete Details of the Limited Warranty, Including Applicable Terms and Conditions, See Your Local Installer or Contact the Manufacturer for a Copy.

TYPICAL REFRIGERANT PIPING RECOMMENDATIONS

General Notes:

1. Vertical risers not to exceed 60 feet [18.29 m].
2. Locate the condensing unit and evaporator(s) as close together as possible to minimize piping runs.
3. Condensing units are shipped with a nitrogen holding charge. Evacuate condensing unit before charging with refrigerant.

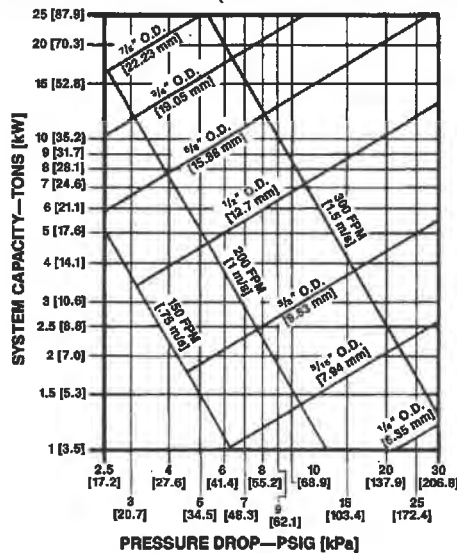
TUBE SIZE (IN.) [mm] O.D.	SOLENOID VALVE	ANGLE VALVE	SHORT RADIUS ELL	LONG RADIUS ELL	TEE LINE FLOW	TEE BRANCH FLOW
1/2 [12.7]	70 [21.3]	8.3 [2.5]	1.6 [0.5]	1.0 [0.3]	1.0 [0.3]	3.1 [0.9]
5/8 [15.88]	72 [21.9]	10.4 [3.2]	1.9 [0.6]	1.2 [0.4]	1.2 [0.4]	3.6 [1.1]
3/4 [19.05]	75 [22.9]	12.5 [3.8]	2.1 [0.7]	1.4 [0.4]	1.4 [0.4]	4.2 [1.3]
7/8 [22.23]	78 [23.8]	14.6 [4.4]	2.4 [0.7]	1.6 [0.5]	1.6 [0.5]	4.8 [1.5]
1 1/8 [28.58]		18.8 [5.7]	3.0 [0.9]	2.0 [0.6]	2.0 [0.6]	6.0 [1.8]
1 3/8 [34.93]		22.9 [7.0]	3.6 [1.1]	2.4 [0.7]	2.4 [0.7]	7.2 [2.2]
1 5/8 [41.28]		27.1 [8.3]	4.2 [1.3]	2.8 [0.8]	2.8 [0.8]	8.4 [2.6]
2 1/8 [53.98]		35.4 [10.8]	5.3 [1.6]	3.5 [1.1]	3.5 [1.1]	10.7 [3.3]

EQUIVALENT LENGTH TO EVAPORATOR (FT.) [m]	LIQUID LINE O.D. (IN.) [mm]		VAPOR LINE O.D. (IN.) [mm]	
	COOLING MODEL		COOLING MODEL	
	120	125	120	125
1-15 [1-4.57]	5/8 [15.9]	5/8 [15.9]	1 3/8 [34.9]	1 3/8 [34.9]
16-50 [4.88-15.24]	5/8 [15.9]	5/8 [15.9]	1 3/8 [34.9]	1 3/8 [34.9]
51-100 [15.54-30.48]	5/8 [15.9]	5/8 [15.9]	1 3/8 [34.9]	1 3/8 [34.9]
101-150 [30.78-45.72]	5/8 [15.9]	5/8 [15.9]	1 5/8 [41.3]	1 5/8 [41.3]

EQUIVALENT LENGTH TO EVAPORATOR (FT.) [m]	LIQUID LINE O.D. (IN.) [mm]			VAPOR LINE O.D. (IN.) [mm]		
	COOLING MODEL			COOLING MODEL		
	150	180	240	150	180	240
1-15 [1-4.57]	5/8 [15.9]	5/8 [15.9]	7/8 [22.2]	1 3/8 [34.9]	1 5/8 [41.3]	1 5/8 [41.3]
16-50 [4.88-15.24]	5/8 [15.9]	5/8 [15.9]	7/8 [22.2]	1 5/8 [41.3]	1 5/8 [41.3]	1 5/8 [41.3]
51-100 [15.54-30.48]	5/8 [15.9]	3/4 [19.1]	7/8 [22.2]	1 5/8 [41.3]	1 5/8 [41.3]	2 1/8 [53.9]
101-150 [30.78-45.72]	5/8 [15.9]	3/4 [19.1]	7/8 [22.2]	2 1/8 [53.9]	2 1/8 [53.9]	2 1/8 [53.9]

NOTE: Runs between condenser and evaporator not to exceed an equivalent length greater than 150 [45.7 m] feet.

LIQUID LINE PRESSURE DROP PER 100 FEET [30.48 m] EQUIVALENT LENGTH (TYPE L COPPER TUBING)

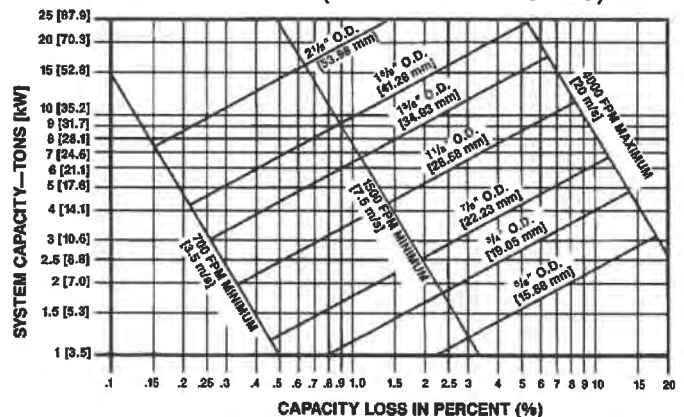


NOTES:

- 1) When evaporator coil is above condenser, the pressure drop due to vertical lift (.5 PSIG per foot of lift) [1.05 kPa per meter] must be added to the pressure drop derived from this curve.
- 2) Size liquid line for no more than 10°F [5.6°C] loss (approximately 50 PSIG [206.8 kPa] total pressure drop).
- 3) Do not oversize liquid line. Oversized liquid lines add significantly to the amount of refrigerant required to charge the system.
- 4) The maximum recommended velocity with solenoid valves or other quick closing devices in the liquid line is 300 FPM [1.5 m/s].

[] Designates Metric Conversions

VAPOR LINE SYSTEM CAPACITY LOSS IN PERCENT PER 100 FEET [30.48 m] EQUIVALENT LENGTH (TYPE L COPPER TUBING)



NOTES:

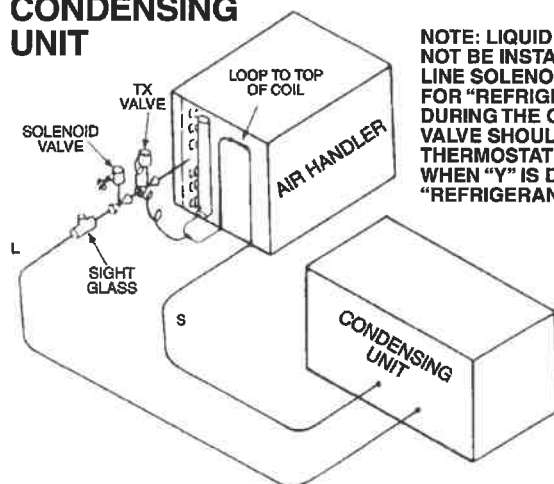
- 1) The minimum velocity line (700 fpm) [3.6 m/s] is recommended.
- 2) For vapor pressure drop (PSIG) [6.9 kPa], multiply percent (%) loss by 1.18.
- 3) Size vapor lines for no more than 2°F [1.1°C] loss which corresponds to approximately 5 PSIG [20.7 kPa] pressure drop.
- 4) Pitch all horizontal vapor lines downward in the direction of flow (1/2" [12.7 mm] to 10' [3.0 m] run).

WARNING

Do not use oxygen to purge lines or pressure system for leak test. Oxygen reacts violently with oil, which can cause an explosion resulting in severe personal injury or death.

TYPICAL REFRIGERANT PIPING RECOMMENDATIONS (cont.)

COIL ABOVE CONDENSING UNIT



NOTE: LIQUID LINE SOLENOID VALVE MUST NOT BE INSTALLED FOR PUMP DOWN. LIQUID LINE SOLENOID VALVE MAY BE INSTALLED FOR "REFRIGERANT ISOLATION" ONLY DURING THE OFF-CYCLE. THE SOLENOID VALVE SHOULD BE CLOSED WHEN THE THERMOSTAT IS SATISFIED (VALVE CLOSED WHEN "Y" IS DE-ENERGIZED) FOR EFFECTIVE "REFRIGERANT ISOLATION".

**REQUIRED OZS. [g] R410A
CHARGE PER FT. [m] OF TUBING**

TUBE SIZE O.D. (IN.) [mm]	LIQUID (OZ.) [g]	VAPOR (OZ.) [g]
1/2 [12.7]	1.06 [30.0]	.04 [1.13]
5/8 [15.88]	1.65 [46.7]	.07 [1.98]
3/4 [19.05]	2.46 [69.7]	.10 [2.83]
7/8 [22.23]	3.28 [92.9]	.13 [3.68]
1 1/8 [28.58]		.22 [6.23]
1 3/8 [34.93]		.34 [9.63]
1 5/8 [41.28]		.48 [13.60]
2 1/8 [53.98]		.84 [23.81]

Quantities based on 110°F liquid and 45°F vapor.

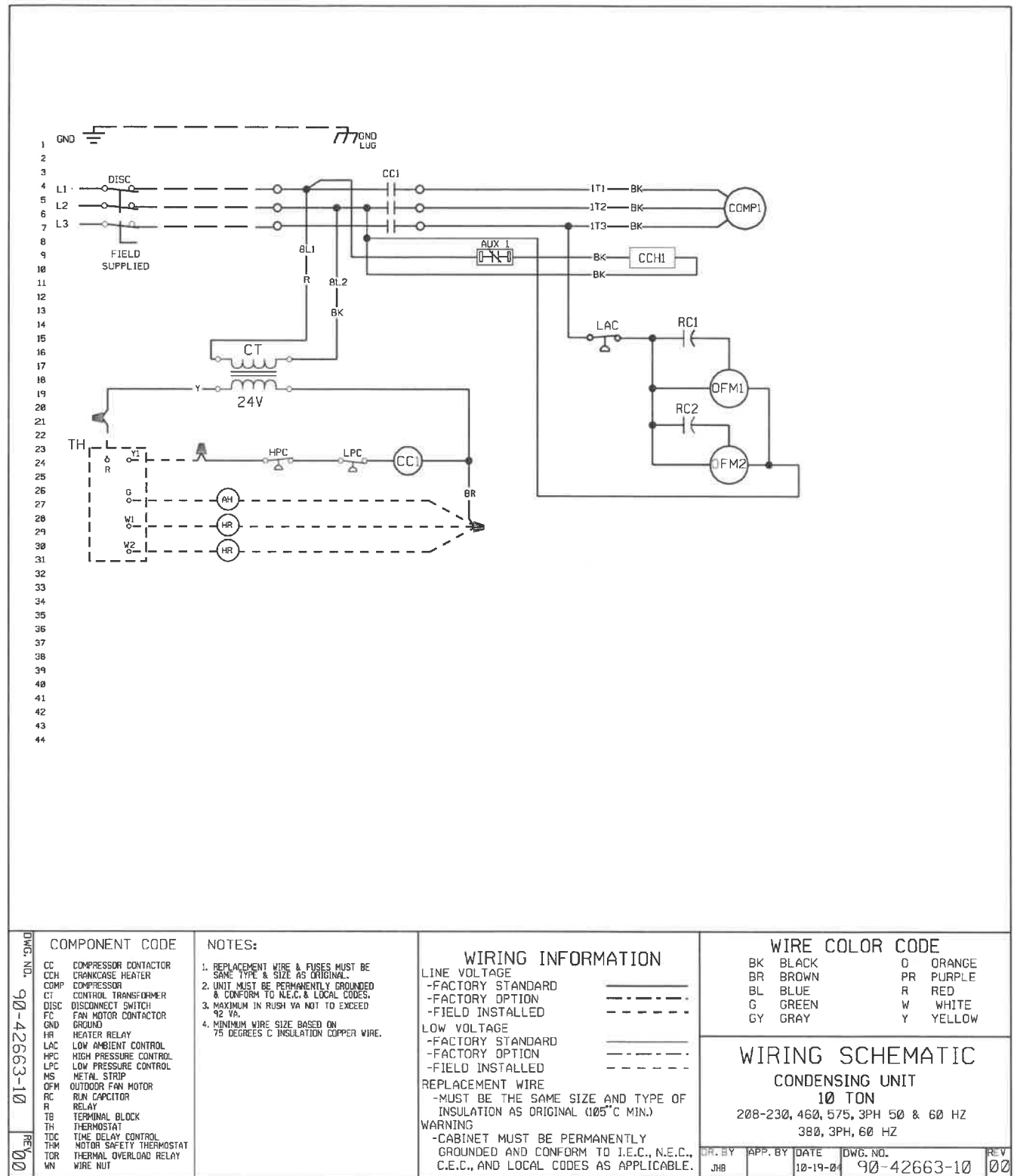
BASIC SYSTEM CHARGE*

RAWL-120	RAWL-125	RAWL-150	RAWL-180	RAWL-240
339 oz. [9610 g]	300 oz. [8505 g]	378 oz. [10716 g]	506 oz. [14345 g]	655 oz. [18569 g]

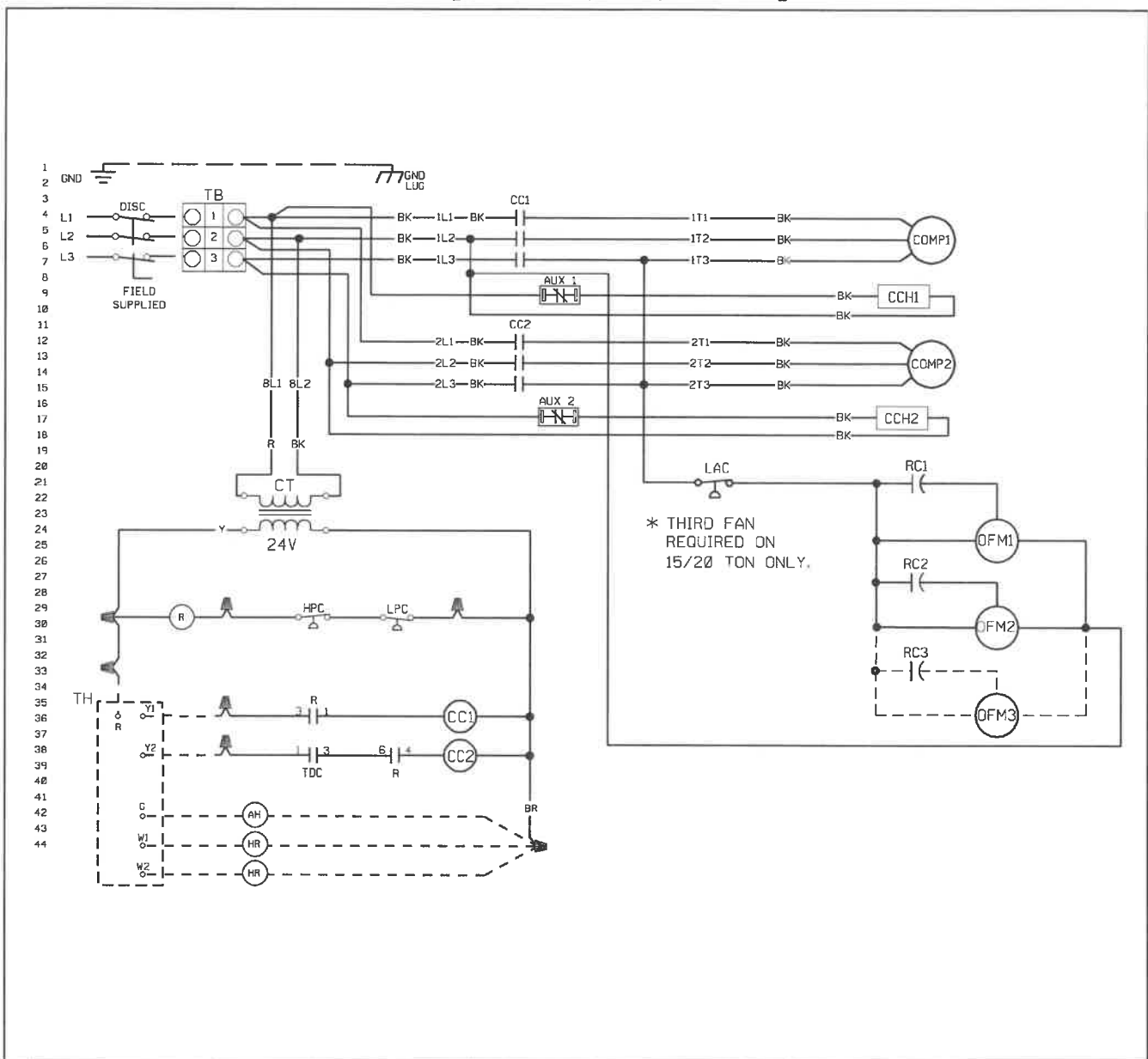
*System with 0 feet [m] of tubing.

[] Designates Metric Conversions

TYPICAL WIRING SCHEMATIC—RAWL-120 10 TON [35.2 kW]



TYPICAL WIRING SCHEMATIC— **RAWL-125, 150, 180, 240 10 TON [35.2, 44.0, 52.8, 70.3 kW]**



DWG. NO. 90-42663-08 REV. 05	COMPONENT CODE CC COMPRESSOR CONTACTOR CCH CRANKCASE HEATER COMP COMPRESSOR CT CONTROL TRANSFORMER DISC DISCONNECT SWITCH FC FAN MOTOR CONTACTOR GND GROUND HR HEATER RELAY HPC HIGH PRESSURE CONTROL LAC LOW AMBIENT CONTROL LPC LOW PRESSURE CONTROL MS METAL STRIP OFM OUTDOOR FAN MOTOR RC RUN CAPACITOR R RELAY TB TERMINAL BLOCK TH THERMOSTAT TDC TIME DELAY CONTROL THN MOTOR SAFETY THERMOSTAT TOR THERMAL OVERLOAD RELAY WN WIRE NUT	NOTES: 1. REPLACEMENT WIRE & FUSES MUST BE SAME TYPE & SIZE AS ORIGINAL. 2. UNIT MUST BE PERMANENTLY GROUNDED & CONFORM TO N.E.C. & LOCAL CODES. 3. MAXIMUM IN RUSH VA NOT TO EXCEED 92 VA. 4. MINIMUM WIRE SIZE BASED ON 75 DEGREES C INSULATION COPPER WIRE.	WIRING INFORMATION LINE VOLTAGE -FACTORY STANDARD _____ -FACTORY OPTION _____ -FIELD INSTALLED _____ LOW VOLTAGE -FACTORY STANDARD _____ -FACTORY OPTION _____ -FIELD INSTALLED _____ REPLACEMENT WIRE -MUST BE THE SAME SIZE AND TYPE OF INSULATION AS ORIGINAL (105°C MIN.) WARNING -CABINET MUST BE PERMANENTLY GROUNDED AND CONFORM TO I.E.C., N.E.C., C.E.C., AND LOCAL CODES AS APPLICABLE.	WIRE COLOR CODE BK BLACK BR BROWN BL BLUE G GREEN GY GRAY O ORANGE PR PURPLE R RED W WHITE Y YELLOW WIRING SCHEMATIC CONDENSING UNIT 10, 12-1/2, 15 & 20 TON 208-230, 460, 575, 3PH 50 & 60 HZ 380, 3PH, 60 HZ DR. BY APP. BY DATE DWG. NO. REV. MGR 11-14-08 90-42663-08 05

SEQUENCE OF OPERATION RAWL-120, Single Stage

1. When the room thermostat is set on "Cool", "Fan Auto", and the temperature is higher than the thermostat setting, the thermostat "Y1" circuit closes and energizes the compressor contactor (CC) through the closed contacts of the high pressure and low pressure controls. Power to the crankcase heater (CCH) will be de-energized by the auxiliary contacts (AUX-1)
2. Simultaneously, the "G" circuit provides power to the indoor blower motor circuit and starts indoor air circulation through the evaporator coil.
3. When the discharge pressure increases to 450 psig, the contacts on the low ambient control (LAC) will allow supply power to start the outdoor fan motors (ODF) which begin to pull air through the condenser coils.
4. The system will continue cooling operation, as long as the room thermostat "Y1" circuit and all safety device contacts are closed. The low ambient control (LAC) will open and close, allowing the outdoor fans to maintain discharge pressure between 250 and 450 psig.
5. When the thermostat is satisfied, the "Y1" circuit will open and de-energize the compressor contactor (CC), stopping compressor operation and closing the auxiliary contacts (AUX-1), which energizes the crankcase heater (CCH).
6. The thermostat "G" circuit will stop blower operation.

SEQUENCE OF OPERATION RAWL-125, 150, 180, 240, Two Stage

1. When the room thermostat is set on "Cool", "Fan Auto", and the temperature is higher than the thermostat setting, the thermostat "Y1" circuit closes and energizes the number one compressor contactor (CC1) through the closed cooling relay (R) contacts. Power to the crankcase heater (CCH1) will be de-energized by the auxiliary contacts (AUX-1).
2. Simultaneously, the "G" circuit provides power to the indoor blower motor circuit and starts indoor air circulation through the evaporator coil.
3. When the discharge pressure increases to 450 psig, the contacts on the low ambient control (LAC) will allow supply power to start the outdoor fan motors (ODF) which begin to pull air through the condenser coils. The system is now in first stage cooling, operating at near fifty percent of full load capacity.
4. If the temperature at the thermostat continues to increase, the thermostat "Y2" circuit closes and after a 30 second delay, power passes through the time delay control (TDC) and energizes the number two compressor contactor (CC2) through the second set of closed cooling relay (R) contacts. Power to the crankcase heater (CCH2) will be de-energized by the auxiliary contacts (AUX-2)
5. The system will continue cooling at maximum capacity, as long as the room thermostat is demanding full load and all safety device contacts are closed. The low ambient control (LAC) will open and close, allowing the outdoor fans to maintain discharge pressure between 250 and 450 psig.
6. As the temperature at the thermostat drops enough to satisfy "Y2", the circuit will open and de-energize the compressor contactor (CC2), stopping compressor operation and closing the auxiliary contacts (AUX-2), which energizes the crankcase heater (CCH2).
5. When continued cooling satisfies the "Y1" circuit, it will open and de-energize the compressor contactor (CC1), stopping compressor operation and closing the auxiliary contacts (AUX-1), which energizes the crankcase heater (CCH1).
6. The thermostat "G" circuit will stop blower operation.

[] Designates Metric Conversions

SAMPLE SPECIFICATIONS

Furnish and install as shown on the drawing Rheem Model _____ air cooled condensing unit suitable for outdoor application.

COMPRESSOR—Unit shall have scroll compressor(s). It shall be externally mounted on rubber grommets to reduce vibration transmission and noise to surrounding area. Maximum power input shall not be more than _____ at conditions specified.

LOW AMBIENT CONTROL—All units shall have standard head pressure controls that cycle the condenser fan motors to maintain condensing pressures for operation down to 0°F [−17.8°C] ambient (12.5 and 15 ton [44.0 and 52.8 kW] models only.)

CAPACITY—Capacity shall be _____ BTU/H when operating at _____ °F [°C] saturated suction temperature.

MOTORS & FANS—Each unit shall have 1075 RPM sleeve bearing, permanently lubricated motor(s) fixed with direct-drive, dual bladed fan(s). Motor(s) shall be equipped with inherent overload protection. Motor(s) & fan(s) shall be mounted on top panel for easy access. Condenser air shall discharge vertically.

COILS—Coils shall be fabricated of 3/8" [9.53 mm] O.D. seamless copper tubing and aluminum fins with die-formed collars mechanically bonded to tubes arranged in a staggered pattern. All coils shall be submitted to a pressure test after fabrication and dehydrated. Units shall be shipped with a dry nitrogen holding charge. Airflow shall be drawn through design providing uniform air distribution across the coil surface.

CASINGS—Casings shall make unit suitable for outdoor installation. Casing, base pan and framework shall be manufactured of galvanized sheet metal subjected to multistage cleaning, primed, and finished with a durable powder coat paint, capable of withstanding a 1000-HR salt spray test per ASTM B 117. Units shall have stamped louver panels offering 100% protection of the condenser coil. Openings shall be provided for power. Dimensions of entire assembly shall be not more than _____ inches [mm] high, _____ inches [mm] long and _____ inches [mm] wide.

REFRIGERATION CIRCUIT—Shall include the compressor, the condenser coils, all internal refrigerant piping and liquid and suction line service valves. Refrigerant stubs shall be extended through the cabinet for external field connection without affecting accessibility to compressor compartment.

CONTROL PANEL—The panel shall be designed for single power source to the compressor and fan motor(s) and shall include fan cycling control, and compressor contactor.

SAFETY CONTROLS—Manual reset high pressure and automatic reset low pressure control shall be provided.

FACTORY TESTING—All units shall be test run at the factory.

[] Designates Metric Conversions

NOTES

Before proceeding with installation, refer to installation instructions packaged with each model, as well as complying with all Federal, State, Provincial, and Local codes, regulations, and practices.

**Rheem Heating,
Cooling and
Water Heating**

P.O. Box 17010, Fort Smith, AR 72917



"In keeping with its policy of continuous progress and product improvement, Rheem reserves the right to make changes without notice."

PRINTED IN U.S.A.

4-10 DC

FORM NO. A11-193 REV. 3
Supersedes Form No. A11-193 Rev. 2

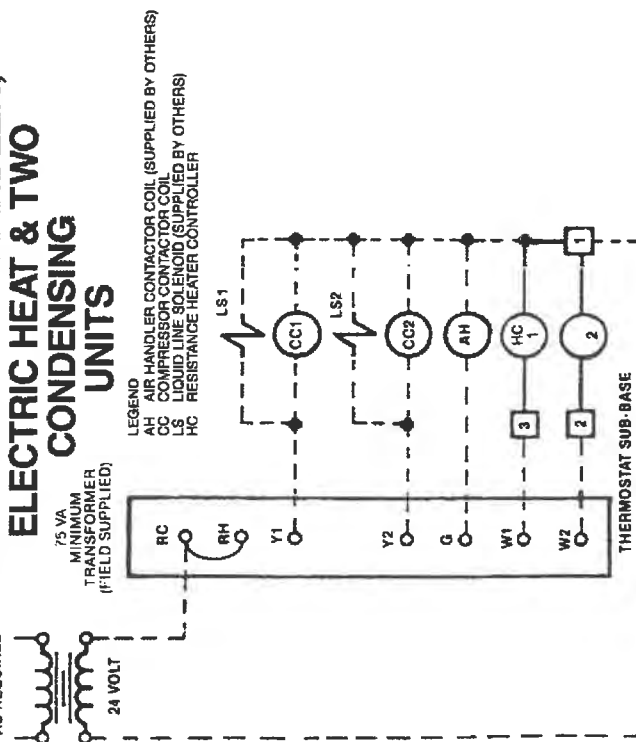
**TYPICAL WIRING CONNECTIONS WITH
DUAL CIRCUIT AIR HANDLER,
ELECTRIC HEAT & TWO
CONDENSING
UNITS**

75 VA
MINIMUM
TRANSFORMER
(FIELD SUPPLIED)

240V 208V 230V 200V 240V 208V 230V 200V

240V 208V 230V 200V

AS REQUIRED

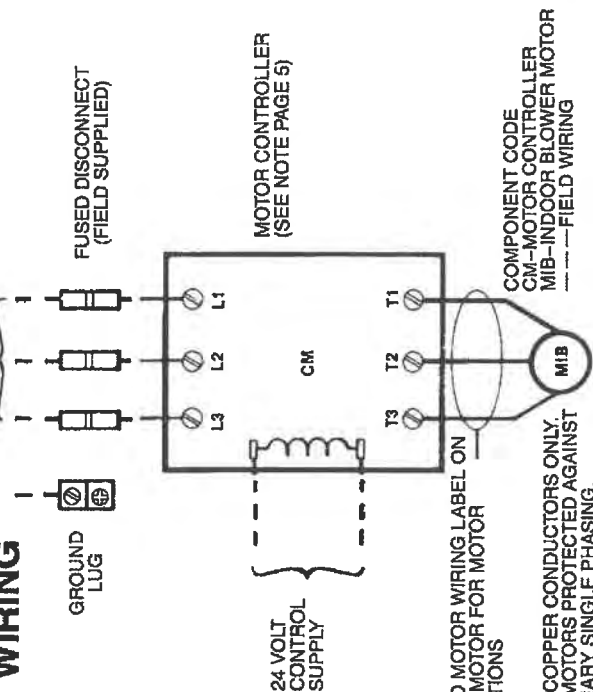


LEGEND

LEGEND
 WAH AIR HANDLER CONTACTOR COIL (SUPPLIED BY OTHERS)
 CCC COMPRESSOR CONTACTOR COIL
 LLS LIQUID LINE SOLENOID (SUPPLIED BY OTHERS)
 HC RESISTANCE HEATER CONTROLLER

THE END OF THE LINE

3 PHASE
POWER SUPPLY



REFER TO MOTOR WIRING LABEL ON
BLOWER MOTOR FOR MOTOR
CONNECTIONS

NOTE:

**E. USE COPPER CONDUCTORS ONLY.
ALL MOTORS PROTECTED AGAINST
PRIMARY SINGLE PHASING.**

COMPONENT CODE
CM—MOTOR CONTROLLER
MIB—INDOOR BLOWER MOTOR
— — — — — FIELD WIRING

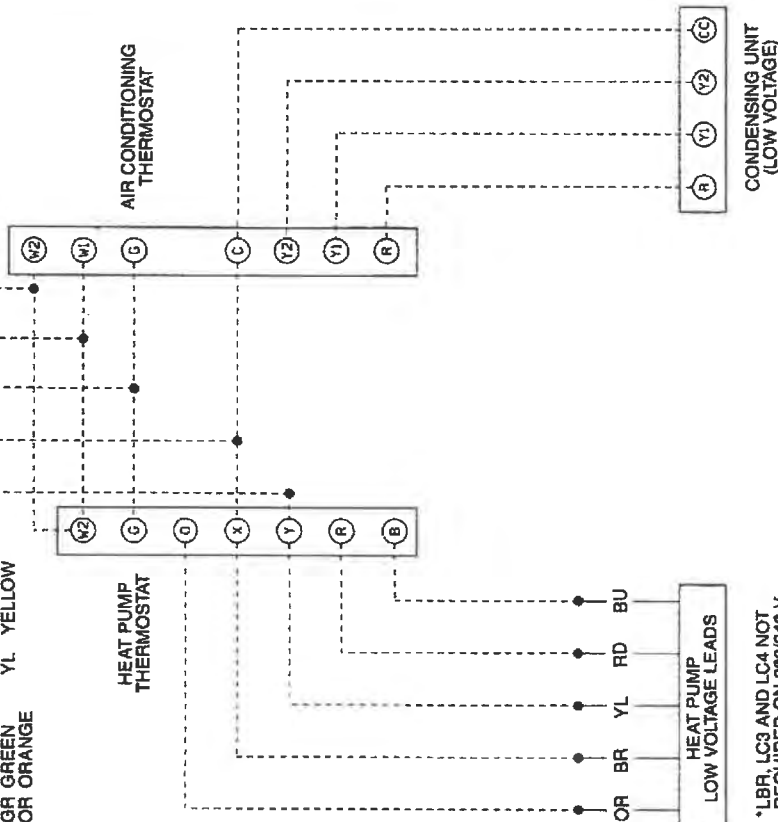
COMPONENT CODE

BC	BLOWER CONTACTOR
HC	HEATER CONTACTOR
LBR	LIMIT BYPASS RELAY
LC	LIMIT CONTROL

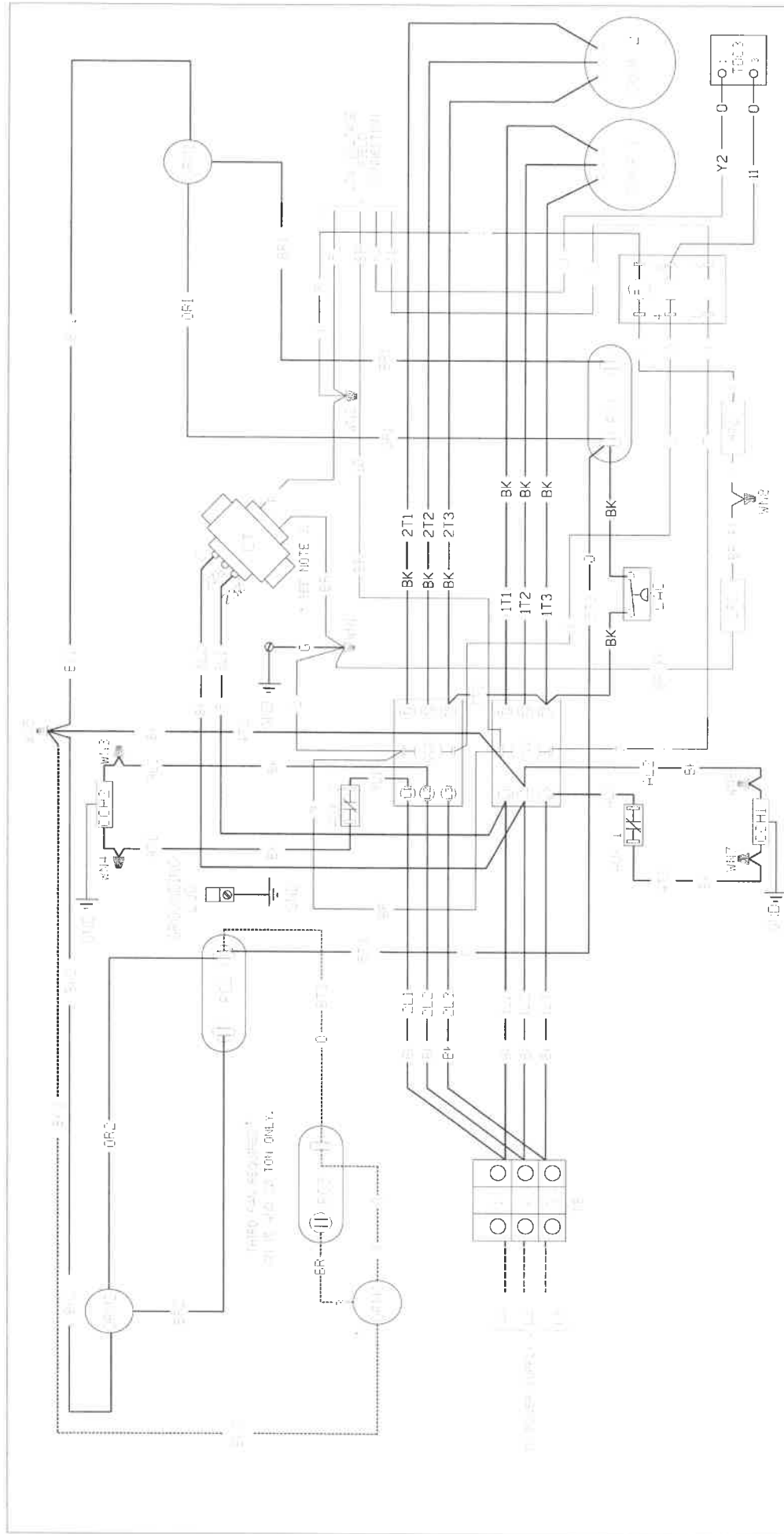
**BLUE LEAD ONLY
USED WITH HEAT PUMP**

WIRE COLOR CODE

BK BLACK
 BR BROWN
 BU BLUE
 GR GREEN
 OR ORANGE
 PU PURPLE
 RD RED
 WH WHITE
 YL YELLOW



LBR, LC3 AND LC4 NOT
REQUIRED ON 208/240 V
KITS RATED 20KW & 30KW
OR KITS INSTALLED ON
15 TON OR 20 TON AIR HANDLERS



COMPONENT CODE	NOTES:	WIRING INFORMATION	WIRE COLOR CODE
COMPRESSOR CONDENSER FAN MOTOR DEFROST HEATER DEFROST TIMER	WIRING IS FOR 10-TON UNIT ONLY. WIRING IS FOR 10-TON UNIT ONLY.	WIRING IS FOR 10-TON UNIT ONLY. WIRING IS FOR 10-TON UNIT ONLY.	WIRE COLOR CODE COMPRESSOR CONDENSER FAN MOTOR DEFROST HEATER DEFROST TIMER
COMPRESSOR CONDENSER FAN MOTOR DEFROST HEATER DEFROST TIMER	WIRING IS FOR 10-TON UNIT ONLY. WIRING IS FOR 10-TON UNIT ONLY.	WIRING IS FOR 10-TON UNIT ONLY. WIRING IS FOR 10-TON UNIT ONLY.	WIRE COLOR CODE COMPRESSOR CONDENSER FAN MOTOR DEFROST HEATER DEFROST TIMER

ELECTRICAL WIRING DIAGRAM
CONDENSING UNIT

10, 12.5, 15, 20 TON
208-230, 380, 460 3PH 60Hz &
200-220, 380-415 3PH 50Hz &
- 575 3PH 60Hz

DR: B7
JRJ

REV: 06

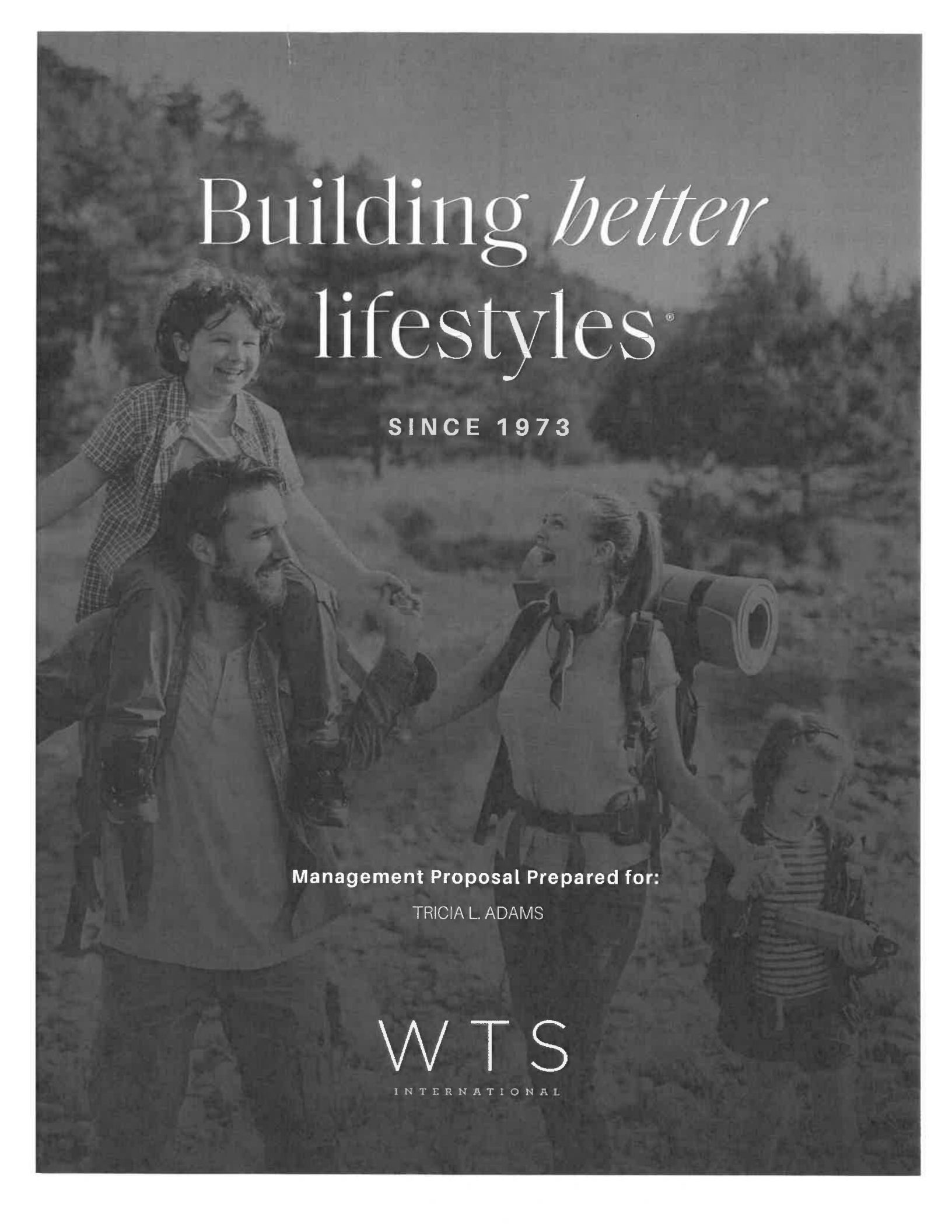
DATE: 2-7-00

QTY: 42663-07

SECTION B

Lakeside Plantation CDD Amenity Services Selection						
	Ability of Personnel (25 pts)	Proposer's Experience (25 pts)	Understanding of Scope of Work (25 pts)	Financial Capability (10 pts)	Price (15 pts)	Total Points Earned
						Ranking (1 being highest)
WTS International, LLC						
Evergreen Lifestyles Management						
Rizzetta & Company						

Lakeside Plantation CDD Amenity Services Selection - Tally						
	Joe Szewczyk	Maria Chichelli	Alan Sabol	Bonnie Benjamin	Nabil Roumy	Total Points Earned
						Ranking (1 being highest)
WTS International, LLC						
Evergreen Lifestyles Management						
Rizetta & Company						



Building *better* lifestyles®

SINCE 1973

Management Proposal Prepared for:

TRICIA L. ADAMS

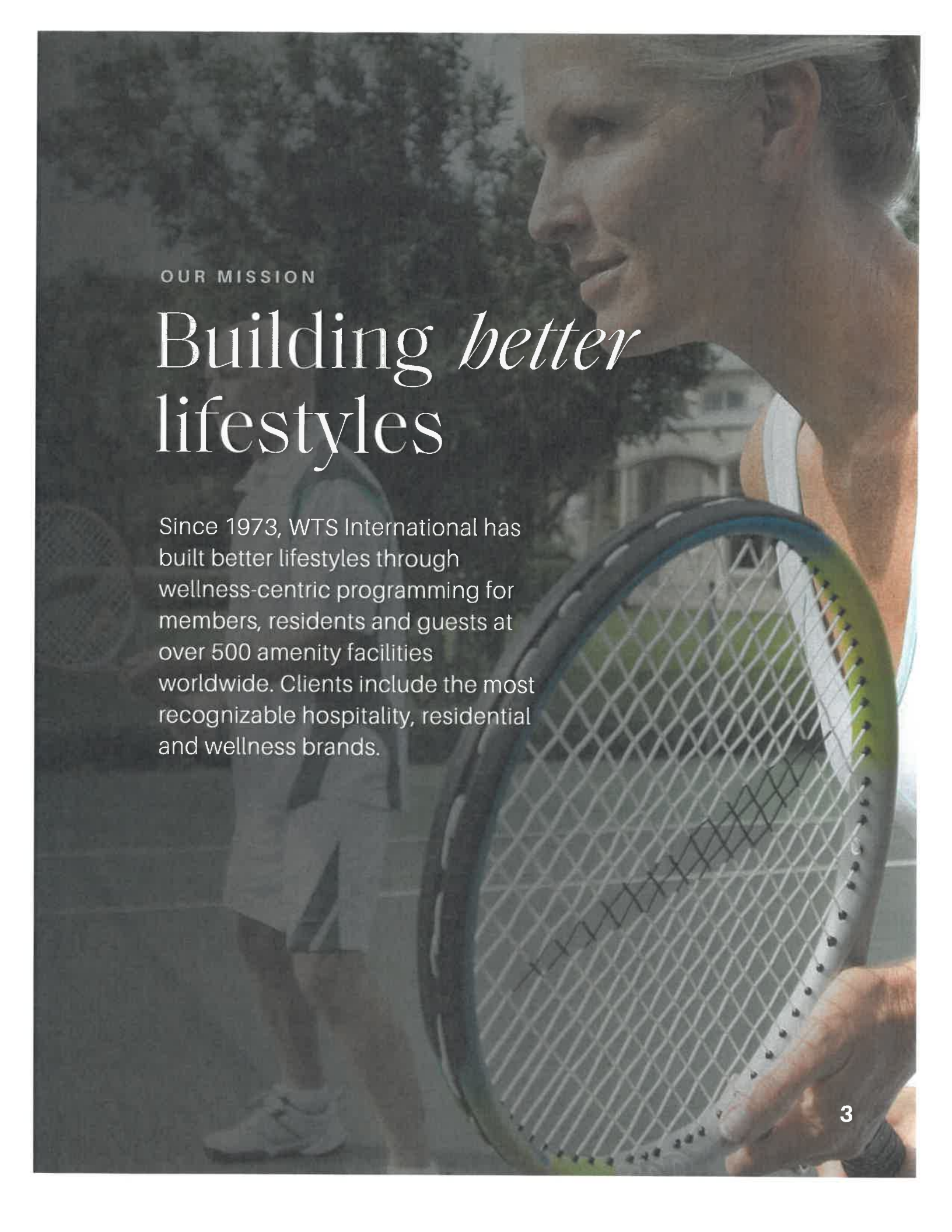
W T S

INTERNATIONAL

OUR PROPOSAL

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SCOPE OF SERVICES	16 - 29
TERMS AND FEES	30 - 31
REQUIRED FORMS	32 - 33

A woman with blonde hair tied back is shown in profile, holding a tennis racket. She is wearing a light-colored tank top. In the background, another person is visible, though out of focus. The overall scene is outdoors, possibly on a tennis court.

OUR MISSION

Building *better* lifestyles

Since 1973, WTS International has built better lifestyles through wellness-centric programming for members, residents and guests at over 500 amenity facilities worldwide. Clients include the most recognizable hospitality, residential and wellness brands.

A smiling woman with short brown hair is wearing a yellow and black life vest. She is on a boat, holding a black oar. The background shows a body of water and distant hills under a grey sky.

DEPTH OF SERVICE

Benefits & *advantages*

DECADES OF EXPERIENCE

SIGNIFICANT INFRASTRUCTURE

DEDICATED LIFESTYLE DIVISION

DIVERSE & UNIQUE PROGRAMS

INTERGRATED WELLNESS OFFERINGS

CURATED SIGNATURE EVENTS

IT, FINANCIAL & SUPPORT SERVICES

Introduction

WTS International appreciates this opportunity to present a proposal to provide Management services for the lifestyle amenities at Lakeside Plantation Community located in North Port, FL.

MANAGEMENT

Throughout the management phase, the focus will be on staffing, implementation of a wide variety of services and programs, facility operations and administration, marketing and promotions and assessing and refining the support systems for optimal performance.

We look forward to answering any questions you may have as you review this proposal. We look forward to collaborating with you.

Regional *Support*



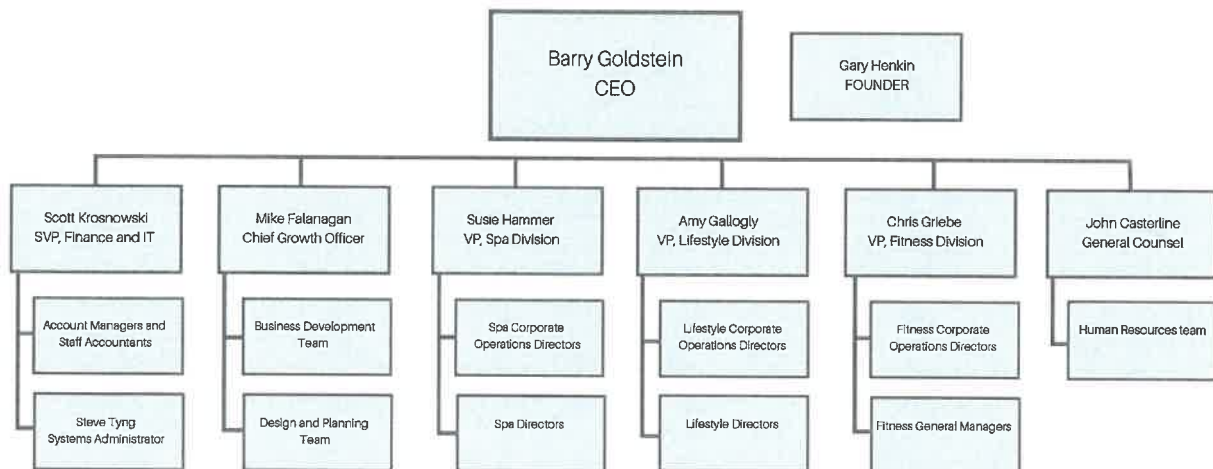
AMY GALLOGLY
VICE PRESIDENT, LIFESTYLE
LOCATED IN TAMPA



ALEX MURPHY
**CORPORATE OPERATIONS DIRECTOR,
LIFESTYLE**
LOCATED IN TAMPA

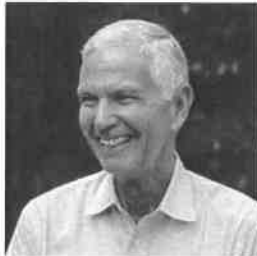
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Organizational *chart*



WTS INTERNATIONAL

Team bios



Gary Henkin

FOUNDER

Mr. Henkin is Founder of WTS International, one of the world's largest and fastest-growing leisure consulting and operating firms providing services to hotels, resorts, luxury residential properties, exclusive golf and country clubs, day spas and real estate developments throughout the United States and overseas. Mr. Henkin brings over four decades of experience in the planning, design and management of health clubs, spas and athletic facilities of all types. He has also coordinated and developed numerous feasibility and needs assessment studies for prospective spa and health club properties.

He received a Bachelor of Science Degree from the University of Maryland in 1966. Presently, Mr. Henkin resides in Maryland with his wife and is active in a number of Washington, D.C. charitable foundations.



Scott Krosnowski

CHIEF FINANCIAL OFFICER

For over fifteen years, Scott Krosnowski, has been extensively involved in the financial and IT operations for resort, residential and private club spas and fitness centers throughout the US and abroad. Mr. Krosnowski specializes in spa and fitness accounting, forecasting and financial reporting. His expertise ranges from constructing financial budgets for new facilities in their pre-opening stages to auditing and recommending growth strategies for existing properties.

In addition, he is responsible for site software selection, specifically client and staff systems that provide data and reports essential to efficient spa and health club management.

Mr. Krosnowski works closely with our clients and staff, ranging from architects and developers to general managers and spa directors, to develop and implement the most appropriate and cost effective financial and information technology systems and procedures.

Mr. Krosnowski graduated from the American University in Washington D.C. with a Bachelor of Science in Business Administration with focus in Accounting and Finance.



Angela Beihl

CORPORATE RECRUITING DIRECTOR

Angela Biehl is a global executive recruiter with over 20 years of talent acquisition experience in hospitality, spa, fitness and wellness, as well as scientific, IT, and other areas of highly specialized hiring. As a strategic HR business partner and talent acquisition specialist for large global consulting firms in Biotech and Health and Wellness, Angela has extensive experience and proven success in full life cycle recruitment, human resources management, operations, workforce planning, pipeline development, and finding exceptional candidates for hard to fill placements. As Corporate Recruiting Director, Angela currently recruits high level positions for WTS facilities and drives the comprehensive recruitment and talent acquisition strategy for all WTS International hires.

WTS INTERNATIONAL

Team *bios*



Chris Griebel

SENIOR VICE PRESIDENT, FITNESS

Chris Griebel is a graduate of the Organizational Leadership MBA program at Grand Canyon University and earned a masters degree in Exercise Physiology and Biomechanics from University of California, Fullerton. Chris has been working in the public and private health and wellness fields for over 20 years.

He began his career as a personal trainer with a passion for wellness and improving clients' lifestyles. Over the years he has been managing multi-site wellness centers, private clubs, hospital systems, and national fitness resorts with expertise in large-scale, multi-site organizational management, new business acquisition, team transition, and operational efficiency.



Alex Murphy

CORPORATE OPERATIONS DIRECTOR, LIFESTYLE DIVISION

Alex Murphy has over 10 years of experience with WTS International in the Lifestyle Division. As a Club Director in both active adult and family communities around the Tampa Bay area, Alex worked diligently to create fresh, versatile lifestyle programming including social, fitness and life enrichment. Her expertise in Lifestyle Programming, Amenity Management, and Large-Scale Event Management provides clients with a wide array of knowledge and experience in all facets of community lifestyle.

Alex was awarded the 2015 WTS Manager of the Year Award in addition to various service awards over the years. She is a Florida native and earned her B.A. from the University of South Florida and is currently working on a Masters in Hospitality & Tourism. In her current position, Alex specializes in on-boarding and pre-openings, resident engagement & participation and building facility utilization. She oversees a team of Lifestyle and Club Directors in the Southeast Region.



Amy Gallogly

VICE PRESIDENT, LIFESTYLE

For nearly two decades, Amy Gallogly has been involved in the leisure and recreation industry. During that time, Amy has gained expertise in all aspects of lifestyle programming, clubhouse operations and event management.

She has assisted non-profit, resort, country club and community recreation properties during her successful career. In recent years, Amy's focused on assisting master planned communities, residential high-rises, fitness centers and luxury resorts. Clients entrust Amy to increase exposure for their residential projects through the implementation of consumer events, grand openings and the creation of a vibrant and engaging community lifestyle. With an undergraduate degree in Commercial Recreation and Tourism from Montclair State University in Montclair, NJ, Amy was appointed Vice President of the Lifestyle Division in 2020.

WTS INTERNATIONAL

Team bios



Nisha Patel

MARKETING MANAGER

Nisha Patel brings her background in fitness and healthcare to the WTS marketing team. As Marketing Manager, she serves as the lead for the Fitness and Lifestyle divisions. Her role involves working directly with facility managers to develop marketing strategies, identify additional revenue streams, and execute digital and print marketing campaigns. She also assists in coordinating with corporate partners to drive increased revenue generation at the site-level.

Nisha graduated from the University of Maryland, College Park with a B.S. in Kinesiology and later received her MBA with a focus in Healthcare Management. In conjunction with her position at WTS, she continues to expand her knowledge of the health and fitness industry through her current role as a NASM certified personal trainer.



Marco Chavez

DIRECTOR OF FINANCIAL SERVICES

Marco Chavez has been involved with WTS for the past 17 years. Marco's responsibilities include providing financial and IT support to the WTS fitness, lifestyle and spa divisions. Marco works closely with each location to develop and implement financial systems, practices, and standard operating procedures, review property financial statements, and audits as required to help achieve each client's goals. Prior to his corporate role, Marco held various positions at the largest residential facility in the WTS portfolio, including General Manager for several years. In his role, Marco oversaw a large and diverse operation including through a multi-million dollar renovation.



LIESKE RENZ

CHIEF PEOPLE OFFICER

Lieske Renz joined the WTS International team as Chief People Officer in 2021 with decades of Human Resources experience. Lieske has worked in a variety of industries, including hospitality, and received her MBA from the University of Maryland University College.

WTS INTERNATIONAL

References

STARKEY RANCH

Matt Call

Project Manager,

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ENCORE FISHHAWK RANCH

Nick Turco

Board president

813-451-3316

nturco2@gmail.com



ASHBURN VILLAGE

Jason Mello

Board President

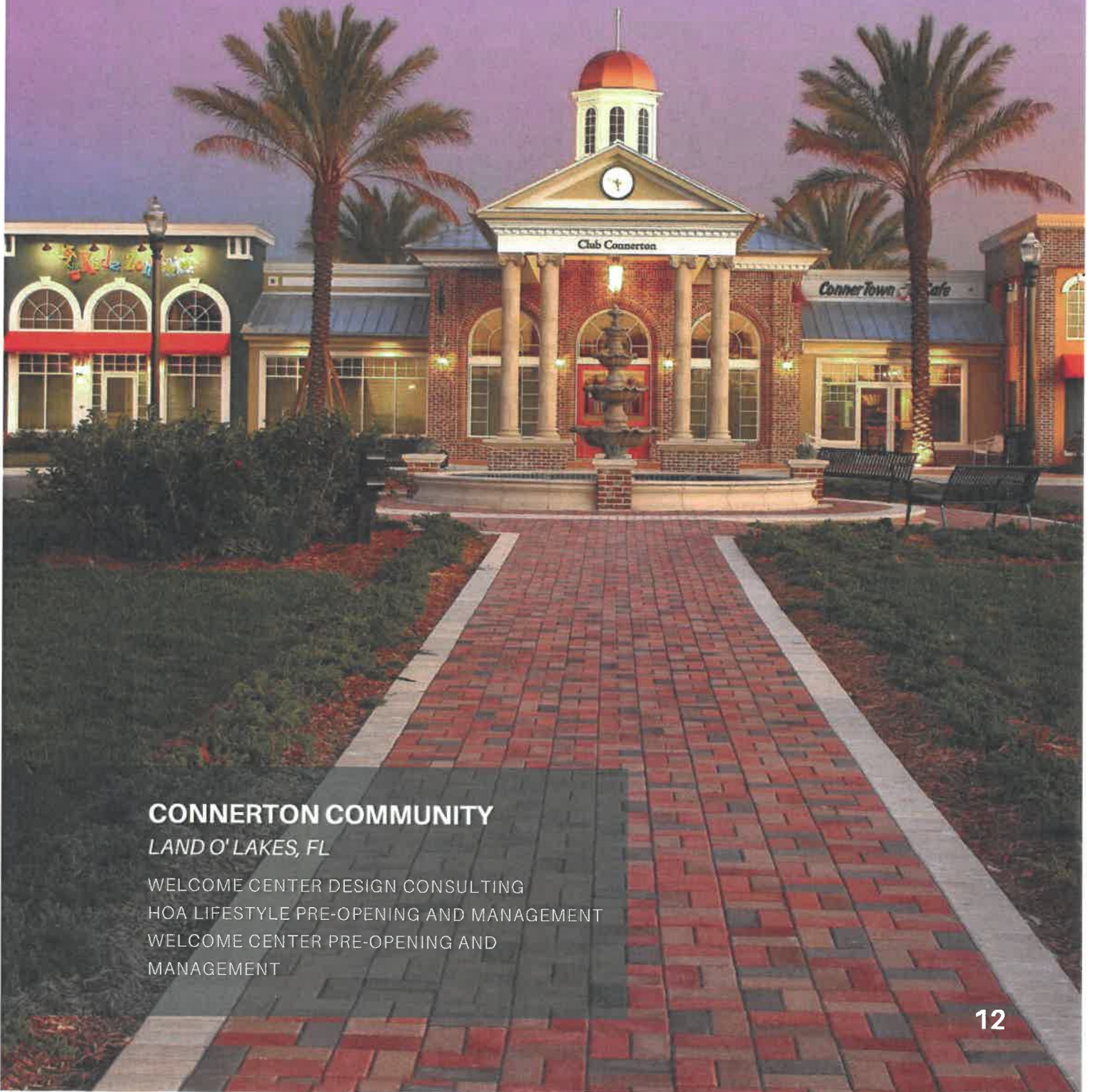
781 - 367 - 0672

melloavboardmember@gmail.com



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Featured *client*



CONNERTON COMMUNITY

LAND O' LAKES, FL

WELCOME CENTER DESIGN CONSULTING
HOA LIFESTYLE PRE-OPENING AND MANAGEMENT
WELCOME CENTER PRE-OPENING AND
MANAGEMENT

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Featured *client*



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LAND O' LAKES, FL

PRE-OPENING SERVICES

DAILY MANAGEMENT

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Featured *client*



ADDISON VILLAGE CLUB
BREVARD COUNTY, FL

WTS INTERNATIONAL

Clients

Dragon Ridge Residential Development
HENDERSON, NV

Starkey Ranch Residential Community
ODESSA, FL

Connerton Community
LAND O' LAKES, FL

Encore at FishHawk Ranch Community
LITHIA, FL

The Springs Residential Community
PALM SPRINGS, CA

The Ridges Residential Community
LAS VEGAS, NV

Skye Canyon Residential Development
LAS VEGAS, NV

K. Hovnanian's Monmouth Woods Residential Community
AHOWELL TOWNSHIP, NJ

Kingstowne Residential Community
Alexandria, VA

70 Pine Street
NYC, NY

London Terrace Towers
NEW YORK, NY
Baccarat Hotel & Residences
NEW YORK, NY

The Continuum Condominiums
SOUTH BEACH, MIAMI, FL

Brickell Flatiron Condominiums
MIAMI, FL

Eighty Seven Park Condominiums
MIAMI, FL

Bay Harbour Yacht Club
PETOSKEY, MI

The Jade Signature Condominiums
MIAMI, FL

Oceana Bal Harbour Spa and Lifestyle Facility
MIAMI, FL



Southern Highlands
LAS VEGAS, NV



Park Grove Condominiums
COCONUT GROVE, FL



Scope of *services*

WTS INTERNATIONAL, LLC ("WTS") proposes to provide the following services for the Lifestyle Amenities (the "Facility") at Lakeside Plantation Community located in North Port, FL on behalf of Lakeside Plantation Community Development District ("Client"). This document is a proposal for WTS to provide the services described herein and not a formal contract. Therefore, the parties agree that this document does not bind either party to proceed. If the terms included herein are acceptable, WTS will prepare an Agreement for Client's review and signature.

2.2 KEY PERSONNEL

Management

WTS will provide complete management and day-to-day operational services for the Facility under the authority of the Client's appointed representative. WTS' role in this area will include the following:

2.2

Where applicable, WTS shall require certifications, training, etc. be secured and updated for all employees. WTS shall provide one (1) Community Director/Amenity Manager who is knowledgeable of WTS's daily activities when performed at the site. This Director shall serve as the point of contact between the Owner and WTS. The Director shall be responsible for coordinating all scheduled services with the Owner. The Director shall be responsible for overseeing all amenity management administrative, maintenance, and recreational personnel, security attendants, landscape and pond maintenance contracts. Should a problem arise, the Community Director shall present the problem to the Owner for direction.

2.2.1

WTS shall provide staff for the following responsibilities:

- Community Director/Amenity Manager
- Office Management Staff
- Lifestyle & Communications Staff
- Tennis Personnel
- Maintenance Personnel.

2.2 KEY PERSONNEL

Management

2.2.2 CONTRACTOR DUTIES

In addition to the responsibilities found in section 4 of this scope of services, the following duties will be provided by WTS.

- Tactfully communicate with residents regarding issues handled by WTS.
- Investigate and resolve complaints and concerns from residents.
- Understand and ensure compliance with federal, state and local legislation relevant to Community Development District and planned communities.
- Assume responsibility for operations and maintenance of all amenities including, but not limited to community pool and spa, playground, fitness center, bocce court, tennis courts, pickleball/basketball court, billiard room, library and clubhouse.
- Assume responsibility for operations and maintenance of all common areas, sidewalks, fountains, parking areas, and storage areas.
- Assume responsibility for management of the security contract for common areas, parking areas, storage areas, amenities and clubhouse.
- All aspects of the product and supply ordering process in order to maintain all supplies at a proper level.
- Attend and speak at new resident orientation meetings or other community information meetings.
- Facilitate staff meetings to discuss upcoming events, District policies, personnel development and pertinent issues.
- Maintain contact with the Owner on an as needed basis.
- Coordinate all scheduled services with the Owner.
- Oversee the janitorial and maintenance of clubhouse and amenities.
- Oversee and manage the landscape and pond maintenance contracts.
- Implement and maintain a safety program for the staff and residents.
- Deliver by mail or electronic mail all records to Owner
- Gather feedback from residents and guests and create improvement plans based on feedback.
- Ensure accurate records (such as incident reports, accident reports, maintenance records) are maintained for insurance purposes.
- Oversee, manage, train and develop amenity management, recreational, and maintenance/janitorial personnel.
- Oversee all aspects of room rental process, including scheduling and planning, working with clients, drafting contracts, collecting fees, and gathering feedback from events.

2.2 KEY PERSONNEL

Management

2.2.2 CONTRACTOR DUTIES

- Oversee all aspects of tennis membership program including gathering fees,
- maintaining records, court scheduling, and promoting compliance with tennis policies.
- Work closely with resident organizations and volunteers for the planning and executing of social events.
- Interview and hire for certain recreational vendors or programs.
- Process all accounts payable and accounts receivable associated with District services.
- Layout, design and maintain tickets, seating charts and other activities materials.
- Maintain promotional flyers and registrations at Club Office.
- Facilitate electronic news messages and electronic newsletters.
- Continuously monitor the facilities and amenities. Document and report incidents to the Owner.
- Maintain an online resident directory.
- Promote voluntary compliance with District policies. Facilitate progressive discipline for those who fail to abide by District policies.
- Owner reserves the right to adjust these requirements as needed.

2.3, 2.4, 2.5, 2.6, 2.7

Management

2.3 PERSONNEL DRESS CODE

WTS shall ensure that employees working on the Project shall wear uniforms or professional attire at all times. Clothing that expresses or implies obscene language or graphics, degrading or demeaning connotations, or in the opinion of the Owner is unsightly for any reason, shall be strictly prohibited. WTS personnel shall wear proper attire at all times and shall wear footwear that conforms to safe work practices.

2.4 PERSONNEL CONDUCT

WTS shall enforce strict discipline and good order among its employees on the Project site. WTS shall ensure that its employees communicate and interact with the Lakeside Plantation community and any other customer/party associated with the Lakeside Plantation Project are knowledgeable of the Project and the Services WTS is performing.

2.6 FACILITY LOCATION

The Owner shall only provide office space on the Project site for WTS as part of this Scope of Services.

2.7 DOCUMENT CONTROL AND DATA MAINTENANCE

Administrator's Records

WTS shall keep accurate records of all incidences that occur while on duty, documents received, and if applicable, issued by WTS. WTS shall keep records of important passwords, vendor directory, maintenance checklists and other documentation important to the day to day operation of the District.

2.8 LIABILITY INSURANCE

WTS shall, throughout the performance of its Services pursuant to this Agreement, maintain: Occurrence basis comprehensive general liability insurance (including a broad form contractual coverage) with minimum limits of \$2,000,000.00 respectively, protecting it and Owner from claims for bodily injury (including death) and property damage which may arise from or in connection with the performance of WTS's Services from or out of any act or omission of WTS, its officers, directors, agents, and employees.

COORDINATION

Management

WTS shall provide coordination with the Owner for all items associated with the requirements of this Agreement.

GENERAL COORDINATION

WTS shall meet with the Owner on a regular basis. The schedule will be determined by the Owner but will likely be monthly. Those meetings shall serve as a forum for the exchange of information, identification of pertinent and critical issues, determination of an action plan and schedule for resolving those issues, review of schedule, and budget status. WTS shall prepare the agenda for those meetings and submit it to the Owner two (2) working days prior to the date of each meeting. WTS shall record and distribute minutes of each meeting to all attendees within five (5) business days, as needed. The Owner shall provide the meeting location which may be a virtual meeting format.

In addition, WTS shall provide a representative to attend the community meeting of the Lakeside Plantation Board of Supervisors. This representative shall be knowledgeable of this Project Scope and Scope of Services and shall be able to respond to any questions the Board may have as to the day-to-day activities at the Project site pursuant to this Agreement; moreover, prepare status reports for the Board per the timeline provided by the District Manager's office.

CONTRACTOR'S COMMUNITY DIRECTOR

WTS shall designate a representative who will be responsible for overall supervision of the WTS's work force on the Project and shall act as the single point of contact, on an as needed basis, between the Owner and WTS. This individual shall be responsible for overseeing all aspects of amenity management.

The Community Director will supervise and facilitate vibrant resident lifestyle opportunities including an array of social, educational, recreational and wellness activities. High quality and timely communication with residents using electronic newsletter, electronic messaging, online resident directory and community meetings will be supervised by the Community Director. Maintaining a clean and safe environment and promoting compliance with District policies are of utmost importance. The Community Director is to ensure all staff and vendor efforts align with these goals.

SCHEDULED OPERATIONS

Management

ACTIVITIES

WTS shall provide social, wellness, and entertainment activities on a weekly and monthly basis. WTS will be responsible for the research, production, scheduling, organization, promotion, and monitoring of a broad range of activities for the residents of the Lakeside Plantation community. At the end of each activity, WTS should gather feedback from participants. WTS shall evaluate the effectiveness of each activity, compile, and implement improvement plans for future activities. WTS shall develop and design promotional flyers, seating charts and other materials for specific activities. The Clubhouse Office will provide information, registration of activities and attend to the needs of residents. The Clubhouse Office staff should answer telephone calls, process incoming and outgoing mail and electronic mail for the community. A schedule of activities must be kept current for Lakeside Plantation and posted in proper locations within the community.

There will be a monthly electronic calendar for the residents and included within the monthly electronic newsletter. Activity rooms will be scheduled, designed and setup prior to each activity. Staff should facilitate community meetings to present upcoming activities and community news. Staff should gather suggestions from residents for future activities and community improvements on a regular basis. Knowledge of the audio/video equipment is required; furthermore, training volunteers and staff to properly use the equipment is required.

SCHEDULED OPERATIONS

Management

EVENTS

WTS shall develop, schedule, promote, plan and facilitate all events for Lakeside Plantation. Events will include banquets, socials, parties, holiday activities, receptions, and other special events. At the end of each event, the Contractor should gather feedback and evaluate success of each event, staff and other resources; furthermore, compile, and implement improvement plans for future events. WTS shall develop and design promotional flyers, seating charts and other materials for special events. Knowledge of the audio/video equipment in the clubhouse is required; furthermore, training volunteers and staff of the equipment is required. WTS will be responsible for ensuring that the Clubhouse and all amenities is secure and locked down on a nightly basis.

CLUBHOUSE AVAILABILITY

WTS will ensure that the Clubhouse will be open for residents and guests seven (7) days per week throughout the year, notwithstanding emergency situations. The Clubhouse Office will be closed on holidays including New Year's Day, Memorial Day, 4th of July, Labor Day, Thanksgiving and Christmas.

ONLINE RESIDENT DIRECTORY & DISTRICT WEBSITE

The Lakeside Plantation online resident directory is the responsibility of WTS. WTS will supervise and maintain the content and technical aspects of the resident directory.

MONTHLY ELECTRONIC NEWSLETTER AND ELECTRONIC MESSAGE BLASTS

The Lakeside Plantation electronic monthly newsletter is the responsibility of WTS. WTS will supervise, design, edit, publish and maintain the content of the electronic newsletter. At all times the newsletter content should contain community amenity news, recreational programming information, community information, special events, and activities. In addition, the contractor is expected to maintain all the technical aspects of the newsletter while implementing new material, graphics and updating content. WTS must maintain a current mailing list of resident subscribers. A representative from the newsletter should attend community meetings, present ideas, share articles and attain information to be included in the newsletter. Electronic mail messages promoting activities, alerting residents to important maintenance news or other information that impacts residents at Lakeside Plantation will be sent as often as needed. All resident communications are expected to be free from grammar and spelling errors.

Management

SAMPLE PROGRAMS

Signature events

- New Year's Eve Gala
- Summer Kick-off
- Hometown Harvest
- Winter Wonderland Celebration

Social

- Friday Night Vibes
- Trivia Tuesday
- Coffee Talk
- Wind Down Wednesday
- Farm to Table Dinner
- Chocolate & Wine Paring
- Philanthropic Programs
- Happy Hour

Wellness

- Nutrition Talks
- Stress Reduction and Pursuit of Joy Workshops
- Blood Mobile
- Flu Shot Clinic

Fitness

- Guided Hikes and Nature Walks
- Kidding around Yoga & Paddle board Yoga
- Line Dancing, Ballroom Dance
- Zumba
- Tai Chi
- Happy Hearts (chair fitness-style class)
- Balance and Flexibility

Club & Interest Groups

- Helping Hands
- Gardening Enthusiast Club
- Water Walking Group
- Card Clubs
- Ladies Lunch Bunch
- Travel Club



SCHEDULED OPERATIONS

Management

COMMUNITY MEETINGS

WTS will schedule community information meetings. The purpose of these meetings is to highlight and outline the activities provided by Lakeside Plantation Community Development District for the Lakeside Plantation residents. These meetings can also serve as an orientation time for new residents to the community. WTS's staff should present activities and information about Lakeside Plantation, community events, and provide thorough and logical answers to resident questions. Representatives, when possible, should be available to present new programs within the community for residents to participate.

CONTRACT MANAGEMENT

WTS will be solely responsible for managing the contracts of the Lakeside Plantation Community Development District to include the provision of security, pond maintenance, pool maintenance, landscape services and any other contract related to recreational services and maintenance at Lakeside Plantation Community Development District.

ADMINISTRATION/OPERATIONS

Management

The Administration and Operations program shall be kept up-to-date at all times by WTS. Revisions to the document shall be indicated by footnote on the revised pages. Revisions shall be distributed by WTS to all document holders. WTS shall prepare draft copies of the document for review and comment by the Owner within ten (10) calendar days of the notice to proceed with the Services.

5.1.1 ADMINISTRATION

The administrative section of the document shall, at a minimum, address those functions, which are the responsibility of WTS related to all administrative matters generally described in the Scope of Services and as outlined below.

- Organizational charts for administrative management functions include key personnel names, job titles, electronic mail addresses, and phone numbers.
- WTS's program for communications with the Lakeside Plantation community relative to operations and customer service.
- Personnel policies and procedures related to WTS's personnel performing services on the Lakeside Plantation site.
- Maintenance Checklists including daily, weekly, monthly and annual maintenance requirements at Lakeside Plantation.
- Hurricane and Severe Weather Preparedness Plan for community readiness.
- Emergency Preparedness Plan to address natural or other disasters.
- Vendor Directory including all necessary contact information for vendors providing supplies or services to the District.

ADMINISTRATION/OPERATIONS

Management

BASIS FOR COMPENSATION AND PAYMENT

WTS shall be compensated for rendered services set forth herein at such time the Lakeside Plantation Community Development District receives revenues from the Sarasota County Tax Collector's Department. Notwithstanding the above, it is anticipated that the Owner and WTS would enter into a lump sum contract whereby WTS would be paid in monthly installments.

5.2.1.

Work Authorizations shall mean orders or directives, in the form attached hereto as Exhibit C, issued by the Owner. Work Authorizations shall be issued for repairs or emergency services, changes to the scope of the area in which services are required, or for any services beyond those set forth in Article 2. Services performed under a Work Authorization may be paid either on a lump sum basis, a unit price basis, or a time and material basis in the Owner's sole discretion, such amount to be invoiced and paid in accordance with the terms set forth in Article 5, and paragraphs b. and c. above. WTS shall not be entitled to compensation for Services outside the scope of Article 2 unless WTS has obtained prior written authorization of Owner to perform the same in accordance with the provisions of Article 8 of this Agreement.

5.2.2.

Owner retains the right to reduce any portion of WTS's Scope of Services as set forth in Article 2, or as amended in any Work Authorization, in accordance with the provision of Article 8 of this Agreement. In such event, Owner shall be entitled to a reduction proportionate to the Fixed Fee.

RESPONSE TIME

Management

WTS shall provide services or a response to the request for service within twenty-four (24) hours of receipt. The following is general response time information and requirements for the Emergency Response Program to be developed, implemented, and maintained by WTS.

GENERAL

WTS shall, on a timely and efficient basis, respond to any and all requests, and inspections, and observations, etc. stipulated in the Project Manual. WTS shall provide supervisory and operating personnel as required who shall be available on call 24 hours per day, 7 days per week to respond to and correct any problems with any of the elements covered by this Agreement.

Should WTS fail to respond to a request for any services addressed in this Project Scope within the required allotted time, the Owner should, at WTS's sole expense, provide the requested services.

Personnel *administration process*

WTS would appoint a carefully selected team comprised of both senior executives and corporate specialists to work intimately with this project who would focus on the areas outlined below. This "team approach" would bring a tremendous support system, resources and training to the table on behalf of the Fitness staff as highlighted in our organization chart.

RECRUITING

We screen and interview over 1,000 applicants yearly for positions within our firm. We will connect your organization with the right talent to match your culture. Examples of positions we can help you fill:

- Fitness / Wellness Director
- Personal Trainers
- Yoga & Pilates Instructors
- Nutritionist

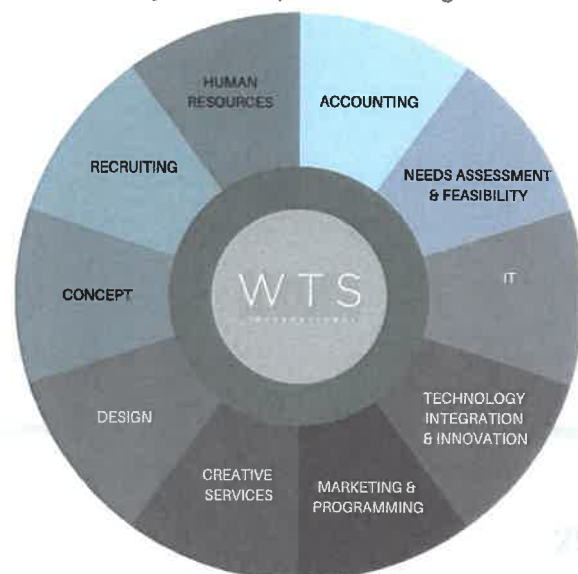
SPECIAL CONSIDERATIONS FOR CURRENT LABOR MARKET

WTS places great value in our employees highlighted by our compensation packages, benefits, and training offered. WTS is also fortunate to have a very large labor pool in the Herndon/Reston market with the presence of our Worldgate Athletic Club and Spa located at 13037 Worldgate Drive, Herndon VA, located just 3.5 miles from 2000 Innovation Way where we have a deep labor pool of personal trainers, front desk receptionists, group exercise instructors, and management team members to bolster our already robust recruiting efforts in this current environment. We are confident staffing will not be an issue.

SERVICE DELIVERY

WTS has developed a Training and Professional Development System called the Learning Management System (LMS) where a curriculum has been developed to create programs and activities that increase service levels and operational excellence. Onsite staff consistently receive input and training from WTS in all areas of facility operations including:

- New Hire Orientation
- Fitness Orientation
- Fitness Front Desk Foundations
- Basics to Excellence (Customer Service)
- Performance Management
- Compliance Excellence
- Training Your Team



Terms and *fees*

TRANSITION MANAGEMENT SERVICES

WTS will charge a total fee of **\$5,000** for the transitional services. During this time, WTS will recruit, hire, and train the appropriate personnel.

MANAGEMENT SERVICES

WTS proposes to provide Management Services for an initial period of three (3) years. The term of an Agreement would begin on an agreed upon date and continue for thirty-six (36) months thereafter.

WTS will charge the following management fee which is exclusive of Facility employee salaries, benefits, costs and other operation expenses. It is inclusive only of WTS' time and expertise in the delivery of the daily operational services outlines in this proposal. The monthly fee will be determined from a "Base Compensation".

Base Compensation

\$4/unit, as # of units increase, so does total cost.

Terms and *fees*

Insurance

WTS insurance is a pass-through expense that covers the cost of all operational claims from intake to resolution.

Expense Reimbursement

WTS will be reimbursed for all reasonable expenses associated with services provided outlined herein. This will include expenses associated with WTS corporate representative's site visits and inspections throughout the term of WTS' involvement, including but not limited to economy-class airfare, lodging expenses, rental car expenses, meals, parking, courier expenses and other similar and customary items.

Display Operating Expense

Client will be responsible for all operating expenses pertaining to the day-to-day operation of the Facility. These will include, but not be limited to, the following: programming and event supplies, advertising and marketing costs, courier expenses (such as Federal Express, UPS), telephone, utilities, retail product expense, all operating supplies, laundry and uniforms, computer and software expenses, etc.

Payroll and Human Resource Administration Reimbursement

With respect to all persons engaged in work at the Facility who are employed by WTS, Client agrees to reimburse WTS for all wages, salaries, associated taxes, background checks, sexual offender checks, drug screening, timekeeping system licensing and other employer's payroll expenses, payroll courier services and a processing fee as reflected in the operating budget. WTS will debit Facility's operating account for the amount of the payroll invoice and of the monthly health benefits invoice.

Litigation *report*

	State	Incident	Disposition
J.U.	FL	Hotel guest injured while using the hotel's self-service fitness center. WTS operates the nearby hotel spa and tasks an attendant with cleaning the fitness center. WTS sued for negligent operation of the fitness center.	Trail set for January 2022. WTS vigorously defending itself. WTS not responsible for supervising fitness center users or for upkeep of equipment.
A.S.	FL	Guest alleges that male massage therapist touched her inappropriately during a massage.	Settled out of court.
I.P.	FL	Guest alleges that male massage therapist touched her inappropriately during a massage.	Plaintiff abandoned case.
A.L.	CA	Employee alleges violations of California wage and hour law.	Settled out of court.
E.H.	CA	Employee alleges hostile work environment and sexual orientation discrimination.	Settled out of court.
E.B.	VA	Guest cut toe on raised tile in hot tub.	Settled out of court.
M.G.	LA	Guest alleges burn to lower back from hot stone massage.	Settled out of court.
S.M.	CA	Guest slipped and fell in women's shower.	Settled out of court.
M.T.	VT	Employee alleged wrongful termination.	Full trial. Verdict for Defendants.
A.M.	FL	Four former employees seeking declaratory judgment releasing them from WTS's non-compete.	Case removed from Federal court to arbitration.

Insurance forms

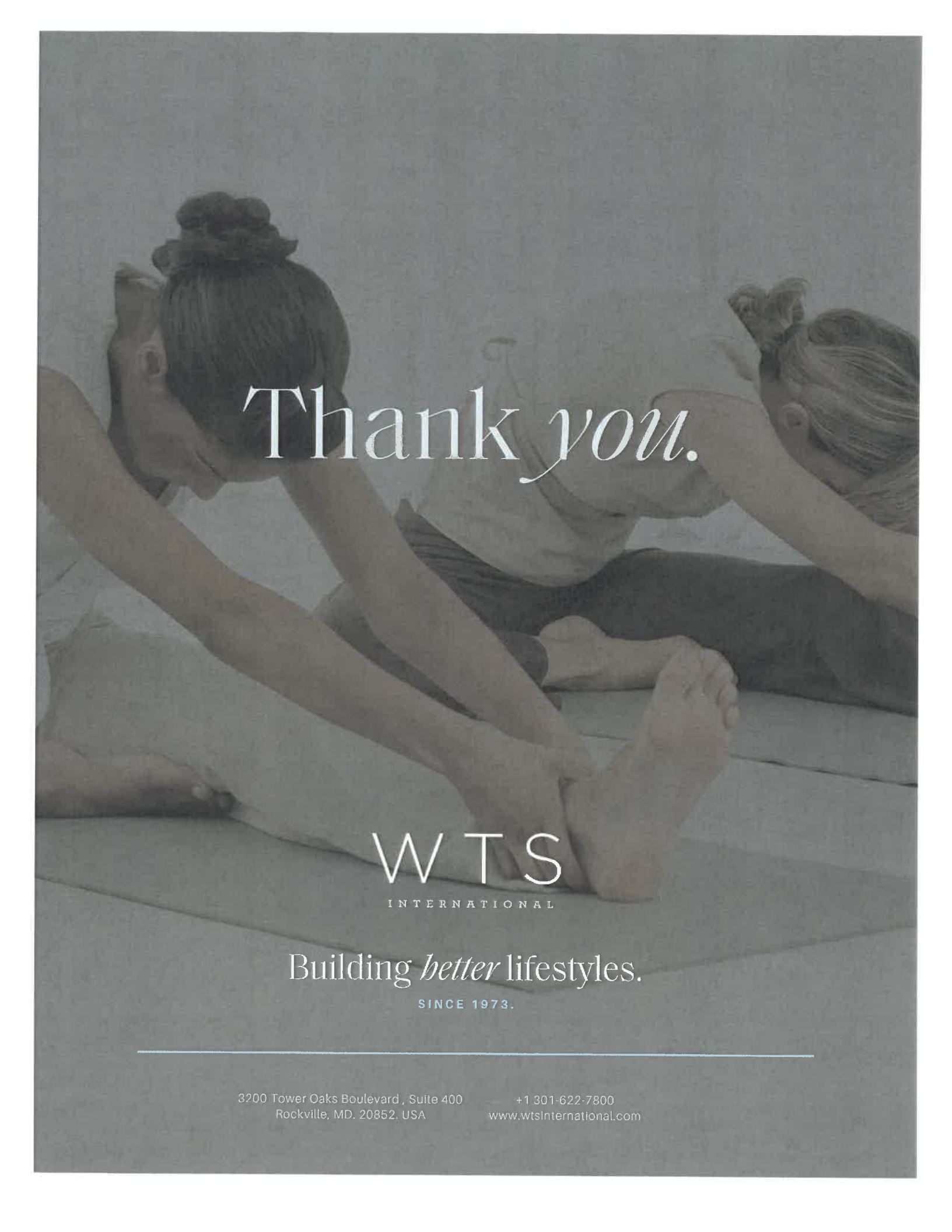
ACORD		CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY) 10/4/2021		
THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. 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).						
PRODUCER HMS Insurance Associates, Inc. 20 Wight Ave Suite 300 Hunt Valley MD 21030			CONTACT NAME: Brittny Nelson PHONE (A/C No. Ext): 443-632-3389 FAX (A/C No): 443-632-3483 E-MAIL: Bnelson@hmsta.com ADDRESS:			
INSURED WTS International, LLC 3200 Tower Oaks Blvd Suite 400 Rockville MD 20852			INSURER(S) AFFORDING COVERAGE INSURER A: Nautilus Insurance Company NAIC # 17370 INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:			
COVERAGES		CERTIFICATE NUMBER: 1215926638		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.						
RISK LITE	TYPE OF INSURANCE	ADD. SUBV. INS. NO.	POLICY NUMBER	POLICY EFF. (MM/DD/YYYY)	POLICY EXP. (MM/DD/YYYY)	LIMITS
A	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☐ OCCUR GENERAL AGGREGATE LIMIT APPLIES PER: POLICY ☐ PRO- JECT ☐ LOC OTHER:		NN1321001	10/1/2021	10/1/2022	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Per occurrence) \$ 100,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMPIOP AGG \$ AUTOMOBILE LIABILITY ANY AUTO OWNED AUTOS ONLY HIRE AUTOS ONLY SCHEDULED AUTOS ONLY NON-OWNED AUTOS ONLY UMBRELLA LIAB ☐ OCCUR EXCESS LIAB ☐ CLAIMS-MADE DED ☐ RETENTION \$ WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER MEMBER EXCLUDED? (Mandatory in WA) ☐ Y/N If yes, describe under DESCRIPTION OF OPERATIONS below
						COMBINED SINGLE LIMIT (Per accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ EACH OCCURRENCE \$ AGGREGATE \$ PER STATUTE ☐ 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) Re: 2500 Heart Pine Ave, Odessa, FL (Starkey Ranch) Insurance Verification						
CERTIFICATE HOLDER			CANCELLATION			
Evidence of Insurance			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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ACORD 25 (2016/03)

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WTS International, LLC
Building better lifestyles.® Since 1973.

A grayscale photograph of three women in a yoga studio, performing a seated forward bend. The woman in the foreground is on the left, with her back to the camera, reaching for her feet. The woman in the middle is facing the camera, also reaching for her feet. The woman on the right is partially visible, also in the same pose. The text "Thank you." is overlaid in a large, elegant serif font across the center of the image.

Thank you.

W T S
INTERNATIONAL

Building *better* lifestyles.

SINCE 1973.

3200 Tower Oaks Boulevard, Suite 400
Rockville, MD. 20852, USA

+1 301-622-7800
www.wtsinternational.com

LAKESIDE PLANTATION COMMUNITY DEVELOPMENT DISTRICT

BASIC ORGANIZATION INFORMATION

DATE SUBMITTED October 11, 2021

1. Proposer WTS International, LLC ☐ An Individual
[Company Name] ☒ A Limited Liability
Company
☐ A Limited Liability
Partnership
☐ A Partnership
☐ A Corporation

☐ A Subsidiary
Corporation

2. Proposer Company Address:

Street Address 3200 Tower Oaks Blvd. Suite 400

P.O. Box (if any) _____

City Rockville State MD Zip Code 20852

Telephone (301) 622-7800 Fax no. (301) 622-3373

1st Contact Name Amy Gallogly Title Vice President, Lifestyle

2nd Contact Name Jackie Henkin Title Senior Vice President

3. Parent Company Name (if applicable)

4. Parent Company Address (if different):
Street Address _____

P.O. Box (if any) _____

City _____ State _____ Zip Code _____

Telephone _____ Fax no. _____

1st Contact Name _____ Title _____

2nd Contact Name _____ Title _____

5. List the location of the Proposer's office which ^{.\$10}would perform LSPCDD work.

Street Address _____

P.O. Box (if any) _____

City _____ State _____ Zip Code _____

Telephone _____ Fax no. _____

Electronic Mail _____

1st Contact Name _____ Title _____

6. If the Proposer is a corporation, is it incorporated in the State of Florida?

Yes (X) (Proceed to Question 6.1) No () (Proceed to Question 6.2)

6.1 If yes, provide the following:

Is the Company in good standing with the Florida Secretary of State Division of Corporations? Yes (X) No ()

If no, please explain:

Date incorporated FL: 5/18/20 _____ Charter No. M20000004572

6.2 If no, provide the following:

The State in which Proposer is incorporated? _____

Is the Company in good standing with that State? Yes () No ()

If no, please explain:

Date incorporated _____ Charter No. _____

Is the applicant registered with the State of Florida? Yes (X) No ()

7. If the Proposer is a partnership (including a limited partnership or limited liability partnership) or limited liability company, is it organized in the State of Florida?

Yes () (Proceed to Question 7.1) No () (Proceed to Question 7.2)

7.1 If yes, is the Proposer registered with the Florida Department of State, Division of Corporations? Yes (X) No ()

If no, please explain:

Is the Proposer in good standing with the State of Florida? Yes (X) No ()

If no, please explain:

Date Proposer was organized: 10/30/2019

7.2 If no, provide the following:

The State in which Proposer is organized: DC

Is the Proposer in good standing with that State? yes (x) no ()

If no, please explain:

Date Proposer was organized: 10/30/2019

Is the Proposer registered as a foreign partnership or limited company with the State of Florida? Yes (X) No ()

If no, please explain:

8. Does Proposer hold any registrations or licenses with the State of Florida applicable to the contract?
Yes (X) No ()

8.1 If yes, provide the following information and attach one (1) photocopy of each listed license (attach additional sheets if necessary):

WTS International has registrations for various spas and fitness centers throughout the State of Florida
Type of registration _____

License No _____ Expiration Date _____

Qualifying individual _____ Title _____

List company(s) currently qualified under this license _____

8.2 Does the Proposer hold any registrations or licenses with Sarasota County applicable to the contract? Yes () No (X)

If yes, please list and provide a photocopy of each listed license or registration:

9. List the Proposer's total annual dollar value of work completed for each of the last three (3) years starting with the latest year and ending with the most current year

10. What are the Proposer's current insurance limits? (Provide a copy of applicant's

Certificate of Insurance)

General Liability	\$ 1,000,000
Automobile Liability	\$ 1,000,000
Workers Compensation	\$ 1,000,000
Expiration Date	10/01/2022

11. Has the Proposer been cited by OSHA for any job site or company office/shop safety violations in the past two years? Yes () No (X)

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

11.1 What is the Proposer's current worker compensation rating? A++ (superior) XV

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

If yes, please describe each incident: _____

The undersigned hereby authorize(s) and request(s) any person, firm or corporation to furnish any pertinent information requested by the Lakeside Plantation Community Development District, or their authorized agents, deemed necessary to verify the statements made in this application or attachments hereto, or regarding the ability, standing and general reputation of the applicant.

WTS International LLC By: [Signature]
Name of Proposer

This 11th day of October, 2021 By: _____
[Type Name and Title of Person Signing]

(Apply Corporate Seal, if filing as a corporation)

State of Maryland
County of Montgomery

The foregoing instrument was acknowledged before me this 11th day of October, 2021, by Jackie Penkin Vmick of the WTS International LLC who is personally known to me or who has produced driver's license as identification and who did (did not) take an oath.

[Signature]
Signature of Notary taking acknowledgment



LAKESIDE PLANTATION COMMUNITY DEVELOPMENT DISTRICT

AFFIDAVIT OF NON-COLLUSION

STATE OF Maryland
COUNTY OF Montgomery

I Jackie Henken Vinick do hereby certify that I have not, either directly or indirectly, participated in collusion or proposal rigging. Affiant is a Corporate representative in the firm of WTS International LLC, and authorized to make this affidavit on behalf of the same. I understand that I am swearing or affirming under oath to the truthfulness of the claims made in this affidavit and that the punishment for knowingly making a false statement includes fines and/or imprisonment.

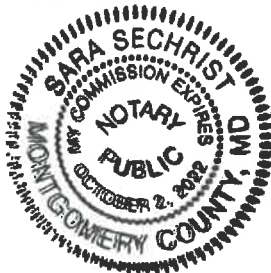
Dated this 11th day of October, 2021.


Signature by authorized representative of Proposer

State of Maryland
County of Montgomery

The foregoing instrument was acknowledged before me this 11th day of October, 2021, by Jackie Henken Vinick, of the WTS International LLC who is personally known to me or who has produced driver's license as identification and who did (did not) take an oath.


Signature of Notary taking acknowledgment



LAKESIDE PLANTATION COMMUNITY DEVELOPMENT DISTRICT

**ACKNOWLEDGMENT OF RECEIPT OF DOCUMENTS
AND PROPOSAL SIGNATURE FORM**

This Proposal for on-site management has been submitted on this 11th day of October, 2021 by WIS International LLC [company] whose business address is 3200 Tower Oaks Blvd, Ste 400, Rockville, MD 20852, telephone number is 301-622-7800, and fax number is 301-622-3373

The undersigned acknowledges, by the below execution of this proposal, that all information provided herein has been provided in full and that such information is truthful and accurate. Proposer agrees through submission of this Proposal to honor all pricing information sixty (60) days from the date of the Proposal opening, and if awarded the contract on the basis of this Proposal to enter into and execute the services contract in substantially the form included in the proposal documents.

Proposer understands that inclusion of false, deceptive or fraudulent statements on this proposal constitutes fraud; and, that the District considers such action on the part of the Proposer to constitute good cause for denial, suspension or revocation of a proposal for work for the Lakeside Plantation Community Development District.

Furthermore, the undersigned acknowledges receipt of the following addenda agenda, the provisions of which have been included in this Request for Proposal.

Addendum No. _____ dated _____

Addendum No. _____ dated _____

Addendum No. _____ dated _____

Addendum No. _____ dated _____

Addendum No. _____ dated _____

CDD & AMENITY MANAGEMENT

Lakeside Plantation Community Development District
OCTOBER 2021



YOUR COMMUNITY.
YOUR HOME.
YOUR EVERGREEN.



EVERGREEN
LIFESTYLES MANAGEMENT

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YOUR COMMUNITY. YOUR HOME. YOUR EVERGREEN.

In today's society it is said that we have forsaken the village for the metropolis, turning our neighbors into strangers, and losing the word "community" from our lexicon. We see things differently...

HISTORY

When Evergreen Lifestyles Management was founded, we set out to create a different kind of Management Company. Golf is more than just a game, it's a lifestyle. There's nothing like stepping onto a well-kept course to play a round with good friends on a beautiful day. That's the feeling we want to promote in every community we manage. The result has been tremendous growth and satisfaction to both our company and the communities.

APPROACH

Communication is the key to any successful relationship. For us, this old adage rings true from our corporate offices in Orlando to the neighborhoods of every community we manage. By bringing together the latest technology with the highest skilled individuals in the industry, Evergreen successfully caters to the complex needs of communities.

SCOPE

Evergreen Lifestyles Management has an abundance of experience in facility management for clubhouses and amenity centers, as well as lifestyle programs to keep residents engaged. Currently we manage more than 175 communities throughout the entire State of Florida, from Jacksonville to the Florida Panhandle to Naples and Ft. Lauderdale, and everywhere in between. Over the next several years we have plans to continue to expand throughout the Southern United States and beyond.



CONTINUED GROWTH

- 2010** ELM was founded
- 2014** Kraig Carmickle was hired as President/CEO, beginning with 19 communities and 200 rooftops
- 2018** ELM signed its 100th contract and was managing over 30,000 rooftops
ELM wins FLCAJ Readers' Choice Diamond Level Award for the 1st time
- 2019** Managing 150+ communities (39,000+ rooftops)
Kraig Carmickle becomes owner of ELM
- 2021 +** Projected to sign 200th contract in 2021 and managing 87,000+ rooftops
ELM wins FLCAJ Readers' Choice Diamond Level Award for the 4th consecutive year

HERE WE GROW AGAIN!

Evergreen brings extensive experience and a powerhouse of talent in Community Association Management and is ready to serve communities across Texas, Arizona, North and South Carolina.

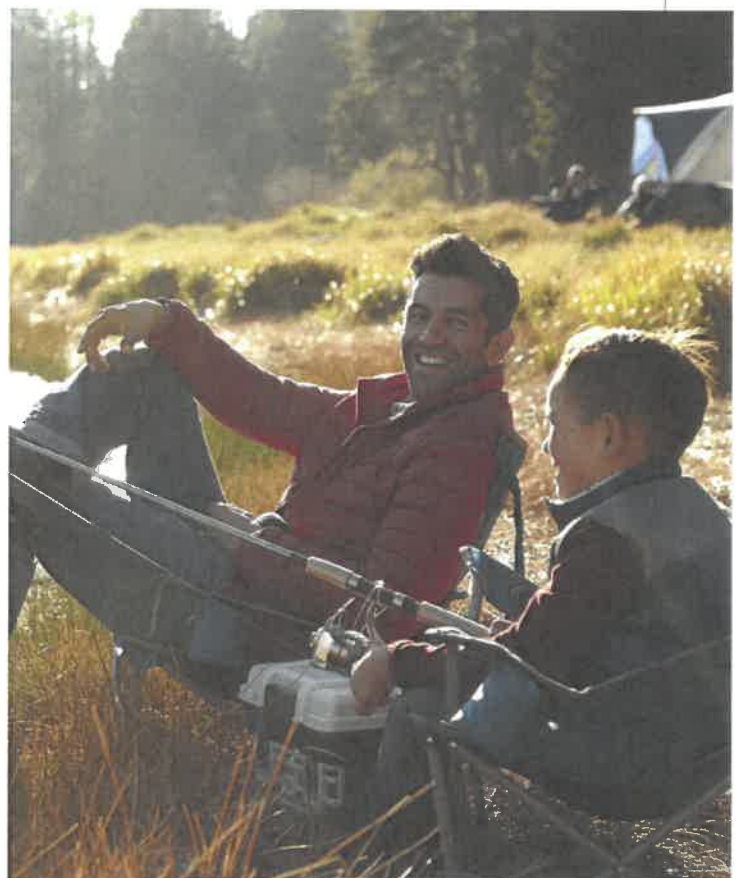


CULTURE

Within Evergreen communities we strive to foster a culture where neighbors know one another, are comfortable helping each other out, and extending an invitation. In order to successfully achieve this end, we first demonstrate these community values within our own company. Through an extensive support system everyone who works for or with Evergreen is given the tools needed to achieve excellence.

OUR GREATEST ASSETS ARE THE MEN AND WOMEN WHO MAKE EVERGREEN WHAT IT IS TODAY.

Within Evergreen communities, we strive to foster a culture where neighbors know one another, help each other out, and extend invitations to new comers. In order to achieve this, we first demonstrate these community values within our own company.



OUR INVESTMENT

Through an extensive support system, everyone who works for, or with Evergreen is given the tools needed to achieve excellence. Advancements in education, training, and certifications are paramount to maintaining the highest skilled staff available. For that reason we support, and encourage our entire staff towards a path of self-improvement.

INTERNAL TALENT

The quality of any organization can be measured by the people who are a part of it. For this reason we set out to bring together the smartest, most innovative, and hardest working individuals we could find. The result is a management team like no other. With over 100 years of combined experience, the Evergreen Leadership Team is a powerhouse of talent.

KEY LEADERSHIP TEAM



KRAIG CARMICKLE LCAM *President & CEO*

Kraig has been in the community development field for more than a decade. He got his start in Arizona managing communities for Blandford Homes, Pulte Homes, and Meritage Homes and was quickly swept up by AAM to handle all of their Florida operations. After a few years, Kraig saw that to realize his full potential he needed to build his own company. This realization came in the form of a partnership with MG Orender and his fledgling management company, Evergreen Lifestyles Management. Since taking control, Evergreen has seen tremendous growth and earned a reputation for quality, consistency, and innovation.



MANDY MORGAN LCAM, CMCA, AMS *Chief Operating Officer*

Mandy spent over 15 years within in the Finance Industry including several years spent as an Equities Trader on the London Stock Exchange. This wealth of experience made the transition into the lifestyle and community management industry seamless. Maintaining her diligent British work ethic, Mandy has set herself apart as someone who is able to surmount any obstacle and continuously motivate her team to do the same. She has successfully managed onsite communities of over 5,000 rooftops, as well as many smaller portfolio style properties, throughout Florida and South Carolina for the last 15 years. She volunteers at Give Kids the World with over 2,500 service hours to date.



ART BURNSIDE *Chief Information Officer*

A veteran of the United States Marine Corps, Art holds a Bachelor's Degree as well as 30 years of experience in a wide variety of roles within the Information Technology profession. Art is dedicated to providing the security, tools and automation required for growth and success.



DENNESE MARTINEZ *Chief Financial Officer*

Denese has 25 years of Accounting experience with Nonprofits and Government Accounting. She has worked with auditors and CPAs on extensive audits delivering great success. Her education includes a Masters in Accounting and Financial Management from DeVry University. Denese also has 10 years' experience in Property Management and working with HOAs. She has led many teams in developing strategic plans and policy and procedures for accounting teams.



KATIE JOHNSON *Chief Human Resources Officer*

A native of California, Katie has a B.S. in Business Administration with an emphasis in Human Resources and officially joins Evergreen in August 2019. She has been affiliated with Evergreen through Hampton Golf since December 2009 and started off as a Marketing Agent in the Customer Service Center, promoted to the Accounting Department and resided in Human Resources as the HR Generalist. Her primary goal is to ensure all team members are provided the proper tools for success in their careers and aims to continually bring a positive attitude to all who cross her path.

BUSINESS DEVELOPMENT TEAM



JARED WIDMAN *VP of Business Development*

Jared has spent almost fifteen years working in development. After starting with roles in finance, Jared served as the Vice President of Sales for two national corporations. With that experience he went on to serve as Chief Commercial Officer with an international paper company. Jared's leadership and management experience serve as tremendous assets in the community lifestyle management industry.



JANIE LINSOTT *Director of Business Development - Florida*

Janie joined the Evergreen family in 2018. After 15+ years of property management experience she brings forth an abundance of knowledge including her experience as an onsite CAM at a luxury HOA in Lakewood Ranch, FL and previously the RV resort industry. Janie is excited to begin her new journey as VP of Business Development-Florida. Janie will focus on building relationships with developer and resident controlled boards to maintain and grow existing client relationships, while constantly seeking new partnerships & opportunities. When Janie is not working she loves spending time with her family, taking on new outdoor adventures and traveling.



TED HEEL *Director of Business Development - Arizona*

Ted served in the U.S. Navy for four years before graduating from Colorado State University with a degree in Marketing and education. He started his real estate career with Coldwell Banker and Pulte Home Corporation. He went on to manage several communities for Pulte Homes in Colorado. Ted and his family moved to the Phoenix area in 1987 and has had a successful career with several builders, Engle Homes, Capital Pacific, Cresleigh and AV Homes. Ted strives for high ethics and integrity in his business and personal life. Ted is committed to serving the customer and doing the right thing. Ted and his wife Alice reside in Mesa, Arizona.



HUMAN RESOURCES

Our commitment to cultivating outstanding team members is what makes Evergreen an exceptional management company. By actively recruiting the best people in the hospitality and education industries, and training them to deliver excellent customer service, we are able to build strong teams that last. To foster that longevity we support our staff by celebrating their commitment, inspiring their creativity, and rewarding their performance. This department handles:

- Recruiting and Hiring
- Employment Policies and Procedures
- Job and Management Training
- Benefits Management
- Performance Reviews
- Termination and COBRA Compliance
- Drug-Free, Harassment-Free and OSHA Compliance

COMPENSATION

Investing in our people translates into a low turnover rate, which helps keep things running smoothly for you. One of the ways we do this is through competitive salaries, health benefits, and employer matched retirement savings plans. We want staff choosing a career path, not just a job. We work very closely with the Community Association Institute (CAI) and local trade associations to calculate compensation averages for each position within an association. Just another way we keep a competitive edge and maintain longevity with great staff.

STAFF DEVELOPMENT

Evergreen provides ongoing training and support via Evergreen Connect (online educational support) and ELM University. We encourage all of our employees to seek further certification and ongoing education within the HOA & Club industry, proudly at our expense. We also heavily promote a team atmosphere and facilitate regular company meetings, outings, and volunteering for charitable projects furthering our culture of working together and encouraging camaraderie amongst all Evergreen team members across the state.

"Our commitment to cultivating outstanding team members is a big part of what makes Evergreen Lifestyles Management an exceptional management company."



ELM UNIVERSITY

ELM University was established in early 2019 to enhance the knowledge and skill set of our staff. Offering a portal of online classes and seminars on many topics that are business specific, as well as professional development. Evergreen acknowledges that the education of our staff is paramount to continued success in this industry. Staying up-to-date on all changes and state regulations allows us to service our client base to the high standards we expect.

ELM EMBRACE

Here at Evergreen, we believe in the value of serving others and constantly encourage our staff to spread love within our communities and beyond. That could be small acts of kindness, sharing a smile on the job, volunteer clean-up projects, raising funds for a special charity, or organizing food and clothing drives for those less fortunate. With a culture of giving naturally embraced by the Evergreen family, we initiated ELM Embrace. This program will continue to encourage the communities we manage, our vendors, and staff to take hold of the spirit of *Embrace* and make it tangible.



THE ABILITY TO REACH A LIVE PERSON 24 HOURS A DAY, 7 DAYS A WEEK!

Your personalized Customer Service Center provides state-of-the-art service and gives unparalleled depth of resources to your community. This frees your Community Manager from the mechanics of the business, giving them more time to serve each resident's unique needs and desires.



JENNIFER HURDLE *Director of Customer Care*

Born in Rota, Spain and raised in a military family, Jennifer brings a natural ability of adaptation and hospitality to the Customer Care Department. With more than 15 years of customer service experience as an agent, lead and supervisor, Jennifer has frontline hands-on experience on what it takes to provide world class customer service and she is passionate about delivering it. Her vision for Evergreen's Customer Care Department is to always be able to meet resident's needs and be renowned for great service and a positive experience.

OUR PROCESS

By integrating the latest lifestyle and property management software, with 24-hour live call center agents, our community's residents are able to find satisfaction to their issues whenever it is convenient to them. *Y se hablan español, tambien.* If, for whatever reason, the agent is unable to resolve the issue, our chain of management is always on call, all the way up to the CEO.



STATISTICS

Customer Service Team consistently:

- Our goal is to answer all calls within 15 seconds
- Maintains polished phone etiquette
- Handles maintenance and work order input
- Reviews Homeowner accounts
- Deals with data collection and verification
- Fields 10,000+ inbound calls per month



KEY SUPPORT SERVICES STAFF



JAMIE STEVENS LCAM *Director of CAM Operations*

Jamie is originally from a small town in Kansas and relocated to Florida in 2002. She joined Evergreen in 2015 as a Portfolio Manager, and grew into the role of managing all regional managers within Florida. Jamie has nearly two decades of Property Management experience in a variety of roles. She prides herself in supporting, appreciating, and motivating her team. Jamie is also an improv actress which has been instrumental in her success within Evergreen.



KEN JOINES LCAM *Director of Operations, West Coast Florida*

Ken joined Evergreen with over a decade of Community Association and CDD experience in team, portfolio and on-site management, as well as administrative, financial analysis, and accounting experience. He has nearly two decades of experience in retail, financial planning, business consulting, and commercial real estate. Ken received his MBA with concentrations in Finance and Commercial Real Estate from the University of Florida – Hough Graduate School of Business. When not working, he enjoys spending time with family, at the beach or in the mountains.



TODD MOSELEY LCAM *Director of Training & Development*

Todd joined the Evergreen family in December of 2016. He brings more than 5 years of Community Association Management experience in portfolio and on-site condo management to Evergreen. With 15 years of film production, construction, HVAC, service industry, maintenance and warehouse management; he works hard to bridge the gap between Board member/homeowner and client/vendor relationships.



GRIS ROMERO *Executive Director of Support/Collections & Risk Assessment*

A native to Brooklyn, NY, Gris relocated with her family to Orlando, Florida in 2001. Gris joined the Evergreen Family in August of 2017. She has a degree in General Studies with coursework in Real Estate and Business Management. As a former Florida Registered Paralegal, Gris has nine years of experience in the Mortgage Foreclosure and Lien Foreclosure field.



DAYNA PATRICK LCAM *Transitions Officer*

After 16 years of living on the "World's Most Beautiful Beaches" in the Florida Panhandle, Dayna returned to Central Florida in 2013 to continue pursuing a career in community association management. Dayna has experience with Developer and Homeowner-controlled communities, with a strong background in contract negotiations, budgeting and a focus on customer relations with positive communications.



RAJVEE KAPADIA *Documents & Compliance Officer*

Rajvee joined Evergreen in 2019. Having worked as an Attorney in Australia for a number of years, Rajvee brings to Evergreen her experience in property and commercial legal matters. Rajvee has assisted individuals and businesses to navigate the legal complexities of small and large transactions, ensuring compliance with all legal obligations pursuant to statute. Rajvee uses her skills and experience to make Evergreen Lifestyles Management the best at what it does!

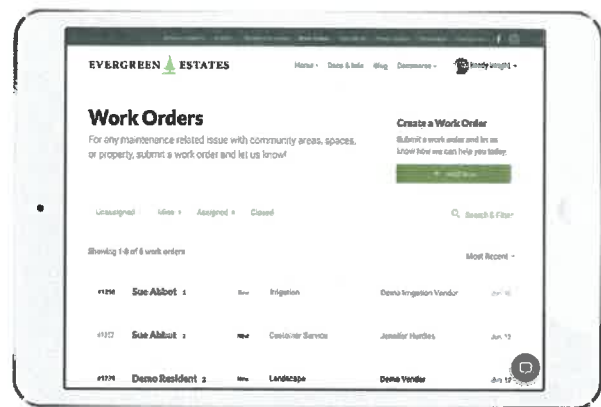
POWERFUL TOOLS THAT SEAMLESSLY CONNECT OUR BUSINESS TO YOURS

Meet Evergreen Connect, an innovative tool that connects our team and helps bridge the communication gap between employees, vendors, and the residents we serve.

WORK ORDERS

Evergreen Connect enables our team to control, dispatch, and manage work orders easily. We decided to take back control of our production process by simplifying the paperwork that's holding us back and provide a customer experience that promotes communication and accountability.

Work orders can be created and assigned to the right people to get issues fixed and resolved in a timely manner. Everyone included in the work order circle, whether it be residents, board members, or vendors, are instantly notified of updates and can leave important information on the work order in a real-time environment.



WEBSITE ADMINISTRATION

Our entire online platform is managed in-house. The onsite community manager and lifestyles director, as well as anyone assigned, will have full administrative control of all online activity. They will also have 24/7 support from our IT team.

CDD MANAGEMENT SOFTWARE

To manage the CDD side of things we partner with the best Association Management Software companies to seamlessly integrate their software with ours. Now residents and boards have real time access and accountability.

VIOLATIONS/GRIEVANCES

We setup Violations/Grievance committees with login credentials to view all violations within the community, including violation type and level of violation. The software gives the ability to see pictures taken by the compliance manager of the violation or grievance. On all violations, notes can be added by the manager, resident, or committee/board member. When the incident is resolved, the action is shown complete and the entire interaction is archived.

INNOVATION AND TECHNOLOGY CAN BE FOUND AT THE CORE OF OUR ABILITIES.

Our residents love being able to manage their social lives on their own time, and in the comfort of their own home.

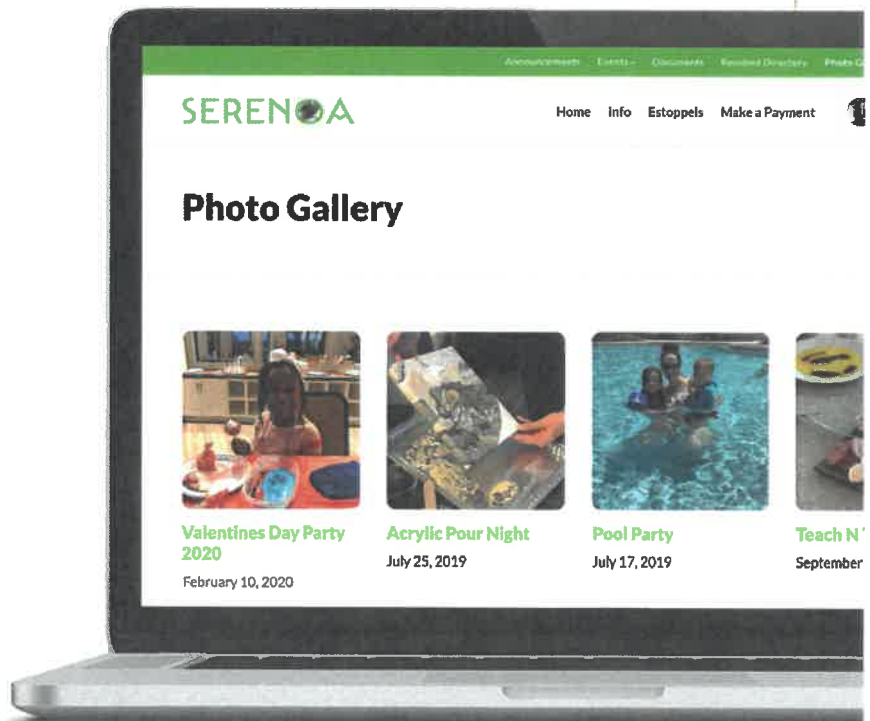


LIFESTYLE COMMUNITY WEBSITES

After dealing with, and picking apart, the available online management platforms, Evergreen came to the realization that the our best option was to create a new one. We hired in-house programmers and partnered them with the Evergreen Leadership Team to conceive a comprehensive and easy to use platform. The result is a fully customized website for each community we serve that addresses all of the aspects of living in and managing a lifestyle community. Within the website residents and boards have the ability to micromanage their lives and communities in real time, and more importantly, on their own time. Plus, there is no more getting stuck with the limitations of third party providers.

FEATURES OF THE WEBSITES

- Publish association documents, financials, and newsletters
- Promote events and gatherings
- Collect RSVPs and process payments for tickets (even assign seating)
- Promote clubs and groups
- Connect with members and sign up new ones
- Online community directories
- Automatically update homeowner record with email address and phone numbers
- Association calendar
- Each resident can customize what is on their calendar
- Customized broadcast emails and messages
- Preferred interest group emails
- Automatically update homeowner record with email address and phone numbers
- Association photo galleries
- Board/committee member pages
- Board tasks/projects page



WE WORK HARD SO YOU DON'T HAVE TO.

Whether full service or customized from our menu of services, you can rest assured that your community will be getting a management program built just for you.

CDD MANAGEMENT STRUCTURE

Good management all starts with assigning the right manager for you. That begins with learning the specific nuances and challenges your community presents. Once we have a clear picture, we are able to put together a team that will serve your community in a way that benefits everyone. A typical community would include the following staff roles:

COMMUNITY MANAGER

The Community Manager's main focus is delivering a first-class service to the Association, and working closely with the Board to enforce the Rules and Regulations as outlined in the Governing Documents. The manager provides leadership and support to all onsite staff including Maintenance, Lifestyle, and Community Standards. Strong management skills, customer service skills, and supervisory skills are required, along with the CMCA certification and 5+years' experience managing a community.

ADMINISTRATIVE ASSISTANT

The Administrative Assistant offers admin support services to the Community Manager and other onsite personnel. This role requires a very organized and detail orientated person.

MAINTENANCE MANAGER

The Maintenance Manager is responsible for working with vendors and onsite maintenance tech to ensure the amenity and community common areas are maintained to the highest standard. This person works on preventative maintenance and oversees the janitorial/housekeeping functions.

MAINTENANCE TECHNICIAN

The Maintenance technicians report to the Maintenance Manager and work to ensure all maintenance needs are met within the amenity center and surrounding common areas.

COMMUNITY STANDARDS MANAGER

The Community Standards Manager is primarily responsible for ensuring the Association Governing Documents and Residential Design Guidelines are upheld within the community through active enforcement and community education. This person will manage and oversee Compliance Coordinators within this position. They also provide both customer service and education to residents and contractors in respect to compliance and the Design Review Committee submittal process. This ensures overall success in maintaining the community standards.



COMMUNITY STANDARDS

We utilize the latest technologies when rolling out a mobile compliance platform. The benefits of a well designed and implemented mobile compliance program are compelling both in terms of time savings for a Community Manager, and improved service to homeowners. When implemented correctly, a Community Standards Manager will be able to easily and quickly capture all of the information for a violation while on location. This eliminates having to take notes and pictures on site and then having to transcribe and upload them when returning back to the office.

Perhaps more importantly, it allows the data to be captured when it is fresh in the manager's mind. The system requires that all critical information is entered and archived. This results in better quality information and eliminating the need to revisit the site to gather information that was missed initially. Since the data is captured while the Community Standards Manager is still on site, it allows the compliance process to start immediately. Letters to

homeowners can begin to be generated, pictures of the violation can be made available on the website, and the time it takes from when a violation is recorded to when the homeowner knows about it is reduced significantly. The end result is a homeowner receiving a notice about a violation that is higher quality, in less time, with less effort by the manager.

The Community Standards Manager will review homesites for Rules/Covenant Violations. The manager will inspect for rules enforcement and maintenance issues, as well as violations recorded, corrective actions recommended, and follow through to resolution based on procedures established by the Association. The inspections are performed as required by the Community Documents. The manager will also monitor homes for sale and ensure violations and delinquencies are identified in the required Re-Sale Packet. In addition, the manager will maintain records of homes being leased/rented.



COMPLIANCE VIEW 360

Compliance View 360 is a platform dedicated to changing the way compliance and inspections are done throughout the community management industry. It uses independently contracted drivers that navigate predesignated routes through your community.

GPS-Driven, 360 Degree Cameras

Our cars navigate a predesigned GPS route through your community and use a 360-degree camera mounted on the vehicle to capture interactive video with annotation and editing tools.

Independently Contracted Drivers

Drivers are background checked and independently contracted to perform community inspections.

Interactive Video Inspections

Interactive inspection and compliance software allows managers to review and create violations without leaving the office.

Violation Transparency

Keeping residents happy is one of the most important objectives in what we do. Interactive video and clear images communicate a singular message that builds trust and respect during the violation process. This also creates a trail of documentation that enables management to make informative decisions.

ARCHITECTURAL REVIEW ADMINISTRATION (ARC)

We process and track all ARC Applications. Once an ARC is received and logged, all ARC requests are date stamped. The applications are then reviewed for completeness and compliance. Evergreen staff will next submit the application with a management summary to the ARC Committee for review. We track the ARC Application to ensure a response is offered within the specified time requirement. Management will then send follow-up written communication, with the Committee's decision, within the required number of days, as established by the Board or Governing Documents, to the homeowner. The progress of the project is tracked with inspections to ensure compliance to the approved application. Lastly, Evergreen communicates to the ARC Committee & Board when the project is completed, and then archives the whole process.

CONTRACTORS AND VENDORS

Evergreen will provide contractor supervision and review. This includes obtaining estimates for Association maintenance items, negotiating best prices and present estimates for review by the Board. We will help review and prepare contracts between the Association and the vendor, oversee and manage all contractors, and inspect all work prior to the payment being issued. In addition, Evergreen will maintain accurate records of all contracts and payments, seek approval of the Board for changes in the scope of work or costs, and ensure major issues are documented and reported to the Board on a timely basis, along with a recommended course for corrective action.

RECORD KEEPING

Evergreen maintains all official association records including:

- Meeting Minutes
- Financial Reports
- Contracts & Agreements
- Homeowner Correspondence (filed by unit/lot)
- Current Owner Listing & contact information
- Owner collection & violation notifications
- Collection referrals & subsequent attorney communication



STAFFING OPTIONS

Staffing is an important component of any maintenance organization. Having a complete in-house maintenance staff is a common approach in most large Master Planned Associations over 2,000 doors. Under this approach, the technicians who perform maintenance are direct employees of the Association or Management Company. The goal of an In-House Maintenance Team is to have the skills/education to do all maintenance in house vs. contracted support. Combined in-house/contract staff is a common approach to associations with less staff around the community.



FINANCIAL MANAGEMENT

Evergreen's accounting team utilizes a well-established system for managing the accounting practices of our communities. Our approach to risk management, insurance, licensing, and other government requirements are tracked and managed daily to ensure the community remains compliant with all regulations, and is protected at all times. We handle everything from owner assessments, financial reporting, and annual budget preparation, to billing, payroll, invoices, audits, taxes and more.

AUDIT AND TAXES

Our accounting team assists the Association's Accountant in performing audits and tax returns. We also ensure the Board's direction on Association investments are carried timely.

INSURANCE ADMINISTRATION

We work with local association trades on bidding out association insurance yearly to get the best coverage at the best price. Our Regional Manager supports your Community Manager in getting the correct insurance for the community.

OWNER ASSESSMENTS

We send coupon books to all Owners via Letterstream, administer and track timely collection of assessments, and deposit funds in the Association accounts in a timely manner. Evergreen also handles sending late notices to Owners, as required per documents. All delinquent accounts are reported to the Board of Directors, and a collection letter schedule, based on the Collection Resolution currently in place, is followed. We send delinquent Owners to the Association's Attorney for collection, document correspondence and actions regarding collections, and report status to the Board in a monthly Management Report.

DELINQUENCY MANAGEMENT

With our management software, your Board is able to track all delinquencies and balances with live data from the Association's collection attorney and Evergreen's Homeowner Account Manager. This enables everyone to stay in the loop instead of waiting for a monthly delinquency report.

FINANCIAL STATEMENT REVIEW AND REPORTING

Every month, the completed financials are sent to the Board of Directors with a detailed variance report. The Regional Manager, Property Accountant, and Community Manager schedule a monthly call with the Board to go over financials.

The accounting team provides the Board with financial reports including (but not limited to):

- Balance Sheets
- Income Statements
- General Ledgers
- Accounts Payable Details
- Summary of Budget vs. Actual
- Aged Owner Reports (Delinquent Payments)
- Bank and Certificate of Deposit Statement Reconciliations

ANNUAL BUDGET PREPARATION

The Regional Manager and Property Accountant work with the Community Manager and Board of Directors to prepare the annual budget. We assist the Board in preparation by using comparatives, history, and the Board's plans for projects in the upcoming year to create a budget and assessment recommendation.

INVOICE PROCESSING

The Regional Manager, Community Manager, Maintenance Manager, and Lifestyles Director are the only people approved to submit invoices. The Invoices are submitted into the system, which automatically enters invoices into the AP module on a daily basis. At that point the invoices must go through an approval process to verify all information is correct prior to being paid out. With CINC Systems the Board has full access to approve or hold all invoices before checks get cut at the Evergreen corporate office.



LOCKBOX AND BANK OPTIONS

Banking with Mutual of Omaha provides bank accounts for Operating, Operating Reserve, Replacement Reserve, and Certificates of Deposit. An online capability for paying monthly or quarterly assessments is provided, however if the Owner prefers to send checks, they may do so using a coupon/envelope provided. When payments are received by 2pm, they are processed the same day. These payments are processed and sent via lockbox to the Management Company where they are automatically applied to the Owners accounts. This is a free service when paid by a physical check, electronic funds transfer or a deduction from a bank account. There is a service charge paid to the bank when paying by credit card. There are currently no monthly bank fees, lockbox fees, return check fees, or stop payment fees. Copies of checks are stored online.

GATE HOUSE ADMINISTRATION

We will evaluate the existing contracts in place and do a cost comparison analysis against other potential vendors. For development we outline the current modules available and identify the best one to fit your community's needs and budget. An example of forward thinking at the Gate House is the use of a virtual guard system, which will reduce the cost of manning the gates, and could be used in conjunction with a roving patrol service throughout the community.



F&B FACILITIES MANAGEMENT AND ONSITE RESTAURANT MANAGEMENT

Evergreen can help manage the Food & Beverage (F&B) facilities and onsite restaurants within a community by curating a plan for purchasing, menus and recipes, inventory control, catering and event sales, safety and sanitation, staffing and much more. We can create a welcoming environment for residents and help organize all the fine details of events needing the F&B Team.

Our team successfully manages F&B facilities at a number of large scale communities across the state, as well as onsite restaurants, including Bellalago's Flip Flops Bar & Grille in Kissimmee, Artisan Park Café in Kissimmee, and Solterra's Café Sol in Davenport.

ENHANCED MAINTENANCE SOLUTIONS

A goal for any Association is to decrease maintenance expenses. Evergreen monitors the Facilities and Common Areas for maintenance issues, recommends corrective actions as needed, carries out Board decisions to correct outstanding issues, and reports grounds status to the Board monthly. The typical goals and objectives for our maintenance program include:

Maximum production at the lowest cost, the highest quality, and within optimum safety standards

- Identify and implement cost reductions
- Provide accurate equipment maintenance records
- Collect necessary maintenance cost information
- Optimize maintenance resources
- Optimize capital equipment life
- Minimize energy usage

TAILOR-MADE LIFESTYLE PROGRAMS FOR THAT ONE-OF-A-KIND ATMOSPHERE TO KEEP YOU ENGAGED.

A good Lifestyle Program will bring residents together in a way that results in a stronger community, a positive narrative, and a more profitable development. Select only the services that are right for your community -- one size does not fit all -- and let us help you customize the perfect Lifestyle Program.

4 PART PROGRAM

Evergreen offers full service Lifestyle Program Management. These services include budgeting, planning and execution of events, organizing and working with resident clubs, conceiving and programming educational classes, as well as implementation and maintenance of world class fitness programs. The Lifestyle Programs are diverse and designed to specifically meet the needs of the residents on a per community basis. The major events are planned for an entire year with additional events offered throughout the year. Community input ensures a vibrant and diverse set of programs.

LIFESTYLES NETWORK

Our Lifestyle Directors have access to a pool of knowledge spanning the network of communities we manage. They meet on a monthly basis, via teleconference, to share ideas and experiences. The directors also meet every other month, in person, to offer training and support. We make these training sessions detailed orientated, covering everything from developing and executing a relevant program, to following up with residents to gauge its effectiveness.

KEY LIFESTYLE LEADERSHIP



AMY MALLINDER *Regional Lifestyle Director - Central Florida*

Amy was born and raised in England, relocating to the US with her family in 2001. Attending both High School and College in the United States. Amy became a citizen in 2015. Her early career has been as a personal assistant to a blind attorney, being his eyes in all aspects of Real Estate Law. Amy has a flair for planning and executing great events. Utilizing her excellent "OCD" skills, Amy helps to keep the Lifestyle programs vibrant across the Central Florida region, as well as excelling in social media and website presence.



LYNZI CHAMBERS *Regional Lifestyle Director - North Florida*

Lynzi joined Evergreen in 2016 as a Lifestyles Director in North Florida. As a North Florida native Lynzi appreciates the value of small communities and strives to incorporate events and activities that bring residents closer together while promoting the community spirit. She is a graduate of the University of North Florida where she obtained a degree in Business Management.



LIFESTYLE DIRECTOR

Primarily responsible for identifying, coordinating, and marketing all resident programs. This includes recreational, social, cultural, educational, and entertainment designed to enrich the quality of life, and enhance the vibrancy of the community. Responsibilities encompass program development and participation, administration of chartered clubs, and overall program marketing.

FITNESS & WELLNESS COORDINATOR

Reporting to the Lifestyle Director, the Fitness & Wellness Coordinator is responsible for developing, coordinating, and marketing community fitness and wellness programs. This includes evaluating fitness instructors as well as existing classes and programs. The coordinator will work closely with trade partners to offer health and fitness workshops and seminars to encourage a healthy lifestyle.

LIFESTYLE ATTENDANTS

The Lifestyle Attendants work closely with the Community Manager and the rest of the Lifestyle Team to offer first class customer service to all residents. This individual plays a crucial role in supporting all aspects of the Lifestyle Program from sign up to clean up.

SWIMMING POOL MANAGEMENT

We understand the importance of pool safety and maintenance in your community. Evergreen staff is certified in First Aid, the administration of Cardiopulmonary Resuscitation (CPR) and the use of Automated External Defibrillator (AEDs), through the Red Cross.

GROUPS/ CHARTERED CLUBS

To enhance the Lifestyle Program of any community, resident involvement is key. Evergreen has guidelines in place for the administration of the "Club" approach. We will work closely with the Board of Directors to understand their vision and assist in setting the activities' boundaries for these club activities.

RESIDENT VOLUNTEERISM

Establishing a relationship with a social committee and encouraging volunteerism within the community is another great way to get residents involved throughout the year. We work with clubs and committees to foster participation and to facilitate a wide variety of programs, which in turn creates an environment residents call theirs proudly.

AMENITY CENTERS

A quality Lifestyle Program starts with a well managed amenity center. The Evergreen family of companies have over 16 years in facility management of clubhouses, onsite restaurants, and commercial retail management. Currently we manage over many large clubhouses and onsite restaurants, and several onsite spas/cottages.

FITNESS PROGRAM MANAGEMENT

The feeling of vitality and wellness are key components to living a happy and healthy lifestyle. Evergreen encourages all levels of participation in a community's fitness program. By utilizing the expertise of an onsite Fitness Coordinator, we are able to take these programs to the next level. The Fitness Coordinator will work with trade partners in the health and wellness arena to offer a variety of services that encourage a healthy way of life. By having an onsite coordinator, the residents can build better trust and understanding. Working directly under the Lifestyle Director, the Fitness Coordinator will assist in generating income from trade partners to supplement classes and facilities. We utilize a regular maintenance schedule to ensure all equipment and facilities remain in top working order.

SOCIAL FUND ADMINISTRATION

Revenue generated from advertising and from trade partner promotions supplement the Lifestyle budget. The social elements are part of the overall operating budget. The Lifestyle Director, along with the Community Manager and corporate management, will work to identify a budget that offers a diverse program of events. Income and expenses will be administered by the corporate accounting team. The Lifestyle Director will be responsible for collecting income from the trade partners and approving expenses as they are needed.

hedule

* Centers and on the Ballalagothia.com Calendar

not designed to strengthen the
it, back, and core in order to
riple, increasing balance, and
strong powerhouses

1.8. Wednesday • 10am
effective core-strengthening that
a staples. This class combines
a body weight as well as a variety
red and strength training.

30 • 4pm
cover 10111 for a 1.5m workout. For

1. • 10am
a class format that targets
ing muscle masses in a simple
The education created by the
motion of the fluid bar creates a
response deep inside the body

1.8. • 11am
an 80m and alignment of the
aligned to help improve strength,
balance and bring peace to both
and mind. This class is great for
all intermediate levels.

1.8. • 11am
a form and alignment of the body
1 is designed to help improve
flexibility, balance and bring
both the body and mind. This
not for beginners or intermediate
at 1 and 2.

1.8. • 11am
rounded class incorporating
cards and mobility balls that will
the range of motion and develop

lung from muscles. A total body workout
that targets strength and balance.

PLAYERS
Wednesday • 10am
improves flexibility, builds strength and
develops core and endurance in the
core body. This class emphasizes on alignment,
breathwork, developing a strong core, and
improving coordination and balance.

SATURDAY CHALLENGE ISLAND
Saturday • 10am
A full body workout that will combine
strength training, dynamic conditioning,
interval training, and cardiovascular
conditioning to increase strength, power,
agility and endurance. Be ready for
anything and bring a healthy!

EXHAUST YOGA
Wednesday • 10am
The benefits of yoga while seated in a chair.
About participants with limited mobility to
also chair for seated postures or standing
postures to help improve mobility, range of
motion and reduce stress.

SENIOR FITNESS
Wednesday • 10am
Join the new instructor Hilda for a fitness
session that consists of strengthening
muscles and increasing range of motion.
Other a chair is used for seated exercises or
standing support.

STRETCH
Wednesday • 10am
Step outside routine with strength training
intervals to give you a complete stretch and
weight training. Excellent cross-training
class for all skill and fitness levels.

STRETCH BY JENNA
Wednesday • 10am
This is a HOT class that incorporates
stretching, strength training and high

Fitness Classes

your email from page 18

Latest moves for a total body workout all in sync with the music!

JUST DANCE PLAYERS
Wednesday • 10am
A playful designed to cut the 1000s (1-2) and 1000s when
you sing along to fun songs and play while we learn.

JUST DANCE & BIKES
Monday • 10am
Cardio body sculpting, strength, cardio and kickboxing!

JUST DANCE
Wednesday • 10am
Join instructor Tanya at 10111 for an invigorating 10
minute Power Flow followed by 20 minutes of Gentle Yoga to
unwind and release tension. All yoga levels are welcome!

JUST DANCE
Wednesday, Wednesday & Saturday • 10am
This dance based fitness class incorporates Latin and International
music and dance. It offers a balanced blend of cardio and creative
moving bodies.

Sports

Ballalagothia Community Center

WRESTLING
Monday • 8pm
Two teams of two players or more on a sand court divided by a net.
First team to 21 wins!

WRESTLING
Wednesday • 8pm
Calling all soccer lovers! The object of the game is to score goals
by kicking or heading the ball into the opponent's goal.

WRESTLING
Wednesday • 8pm
The Volleyball is a modified form of football in which ballcarriers are
forced by pulling off a marker, or flag, loosely attached to a belt,
rather than by tackling.

WRESTLING
Wednesday • 8pm
Choose heavy (1-2) or 1-2-3, ball the basket, and go for the
vital join us for a fun game of basketball.

EVENTS: LIFESTYLES

July

For additional details or to accept/reject tickets for any event, please
visit Ballalagothia.com or call the front desk staff for assistance.
*Event details subject to change.

KEEPS MAKE NIGHT
Wednesday, July 2nd • 8pm-9pm
Ballalagothia Middle-Purpose Room • Free
Test your skills and try your luck amongst your fellow residents!
Some snacks will be provided, but the guys are encouraged to
bring their favorite beverages and additional snacks if they choose.

JULY 6TH POOL PARTY
Thursday, July 6th • 12pm-3pm
Come out to the Pool Party Center pool for ice cream, DJ, games,
prizes and an unforgettable time!

LADIES CARD CLUB
Monday, Wednesday • July 6th, 13th, 20th & 27th • 1pm
Join the Card Club Thursday in the Ballalagothia Middle-Purpose Room.

ADULT BRAGG
Friday, July 6th & 27th • 7pm-9pm • 1st floor of Ballalagothia
Middle-Purpose Room is on at 10111. Residents and guests
must be 18. \$10 gift cards will be awarded for every win.

UPPER COMEDY SHOW
Saturday, July 6th • 8pm-10pm
Graduates of SAK Comedy Lab performing an awesome improv
Comedy show for your Dollars open at 8pm. Concession snacks will
include popcorn, candy and soda. Free event, but \$10 tickets will
be required for entry.

ICE CREAM SOCIAL
Monday, July 7th • 8pm-10pm • Ballalagothia Middle-Purpose Room
Cool down in this summer heat with an awesome ice cream
social made to your specifications.

TRIVIA NIGHT WITH DJ CARDS
Wednesday, July 13th • 7pm-9pm
Ballalagothia Middle-Purpose Room
This FREE event will have you getting to know your neighbors.
Come out and "Remix a Mental Score!"

BINGO
Friday, July 13th & 27th • 7pm-9pm • 1st floor of Ballalagothia
Middle-Purpose Room is a popular game played with one dice and a whole lot of
luck! Come have fun and play for a chance to win \$50 gift cards.
We'll teach you how to play. Bring a dessert or snack to share.

RESIDENT COMMUNICATIONS

Communication is key to the success of any community association. We utilize the latest technology to reach residents with all areas of association business. Weekly e-blasts, newsletters, flyers around the facility, and bulletin boards are all used to reach the community in a timely manner. Evergreen offers weekly e-blasts from the Community Manager as well as Lifestyle updates every week to keep residents involved. The Lifestyle website is fully mobile and can easily be accessed via a tablet or smart device. The community newsletter can also be published to the Lifestyle website.

*"Ad revenues received from a newsletter
offset costs such as monthly events and
future newsletters."*

COMMUNITY NEWSLETTER

The community newsletter is an invaluable piece of the network of communication within a community. We create professional quality newsletters customized, developed, and published on a quarterly, bi-monthly, or monthly basis (depending on the needs of your community). Our design team takes the creation of these to the next level, resulting in residents being more engaged, informed, and connected to the place where they live. We work with a company that offers the administration of the newsletter advertising program, which frees up the Lifestyles Director to focus on their programs. Once the layout and graphics have been completed for each publication, a proof is provided to the Lifestyles Director and Community Manager for approval. The ad revenue is then able to offset the cost of the publication.

AMENITY CENTER FRONT DESK ADMINISTRATION

The Front Desk Services are, often times, the first impression people get of the community. Because of this, customer service is top priority when training this position. It is also critical to get the right policies and procedures in place from the very beginning. They will be able to assist any resident that does not have access to available online platforms. We train our staff on all relevant systems to allow them to assist the residents with all their association needs.

"The Front Desk Services are, often times, the first impression people get of the community... It is also critical to get the right policies and procedures in place from the very beginning."



AMENITY CENTER SCHEDULING AND PRIVATE USE ADMINISTRATION

There needs to be a hierarchy in place for prioritizing use of the space available for private rentals, giving the Board and Association precedence. We will work with the various clubs and committees to establish use on a regular basis organized through a room schedule calendar. This is then published on the website so residents can see when each space is booked. The Lifestyles Director will administer this program and approve rental requests. The income generated from any private booking can be used to offset operating expenses, and a portion can be used to subsidize programs.

AMENITY CENTER EVENT SET UP

The Lifestyles Director will work with the onsite maintenance team to ensure the correct setup for any events that are planned. From time to time this may require working with an outside vendor, if the events are on a larger scale.



OUR COMMITMENT AND COMPETENCE IS REFLECTED IN THE WORDS OF THOSE WE SERVE...

A huge thank you to the Activities team for their continual hard work and commitment to making lives better within our community and our larger community. Investing in people, showing care, extending kindness and providing hopeful days to the less fortunate is a sincere-intentional effort of this team. It reflects the caliber of these individuals beyond their daily duties and reveals the heart of this department within Solivita. Jana, Kaylee, Jennifer, Brandon and Michele spent months planning for our annual Car Show. It was a huge event to undertake with proceeds benefiting a food pantry. Even though this event had to be canceled due to COVID-19, they all continued with enthusiasm to bring a positive closure and support the food pantry. A lot of lemonade has been made over these past eight months. Our club members thank them and welcome more opportunities going forward.

— KERRI, SOLIVITA

Gladys Velez is a great person; she is always ready to help owners or guests. I witnessed it many times. Just keep up the awesome work Gladys and thanks for everything you have already done.

— GORAN SIPKA, SOLTERRA RESORT

Celi Rosario is always prompt in responding to emails and providing clear guidance to various questions, which is especially helpful to new homeowners.

— OTHELLO AMERICA, VICTORIA PARK



Stacy Learned goes above and beyond. She cares about the community and gets the job done, how ever small or big. She has made many improvements in the neighborhood. Thank you, Stacy; keep it up.

— JOSE QUINTANA, REEDY RESERVE

Cameron Gardiner is the BEST! He's always quick to respond to any question and very friendly! Professional in his job, but also very easy to work with!

— NANCY CREW, VERANDAH

Sadia is always pleasant and a delight to be greeted by as one walks in the door. Since my friends and I have been playing cards outside lately, Sadia has brought us warm cookies and even hot cider on particularly gloomy days. She knows how to brighten a day.

— SUE MILLER, VICTORIA GARDENS

TESTIMONIALS

"Justine is an amazingly responsive and clear communicator. She organizes fun events. I appreciate that she utilizes multiple platforms to communicate to residents." – Rob Zakrzewski, Victoria Park

Oscar Gonzalez went all the way to the 9-yard line to help us fix the planting of flower plants and fruit trees while inadvertently forgetting to get approval for them. We really appreciate the help he extended to us. Oscar has a deep concern for both the property owner and community in maintaining a beautiful lifestyle.

– RODOLFO SANTOS, BELLALAGO



I just wanted to let you know that I think Cheri Schrubbe is doing a wonderful job at Southern Hills. She came into a community that needed a strong manager and I feel like she has handled everything exceptionally well. She treats vendors, residents and anyone she is in contact with courtesy and respect. Thank you!

– ELLEN JOHNSON, SOUTHERN HILLS PLANTATION

Shelley Destefano, the Community Concierge, is an asset to Solivita. I simply can't say enough good things about her. She is a sweet, sweet spirit. Shelley is very professional and she makes everyone feel as if they're her only customer. She loves her job and it shows.

– MARVA FORD, SOLIVITA

Shawntez Taylor was so very helpful in walking me through the different websites and portals and setting up each. He was also helpful in showing me how to obtain payment/HOA fee information and how to request a work order. Shawntez was thorough and patient and his help was greatly appreciated.

– STEVE SAUNDERSON, HANOVER LAKES

Yolanda Santiago is a personable, professional and very capable young lady. Whenever I have any dealings with her, I can always feel confident that all necessary steps will be taken to ensure a proper and successful conclusion. Ms. Santiago is a credit to her department and to your business.

– H. BRUCE TUCCI, SOLIVITA

We often take our 4-year-old granddaughter to dinner with us at the clubhouse. Bill McFadden and Jacob Waddle do such an amazing job of making everyone feel welcome. At the Christmas train event my husband took little Arabella downstairs to see the train pass by. When she returned, I asked, "Did you see Santa?" She replied with great enthusiasm "Oh yes, but I also got to see BILL!" Bill definitely won over Santa in her book. This has been a trying year for all, but I have to say our clubhouse remains a shining light through it all. What a great environment. He has managed to keep things safe for everyone, providing activities whenever possible, with appropriate COVID protocol. Bill, Jacob and all the staff there are professional, friendly, and have great attitudes. Well done!

– ELLIE WEAVER, CELEBRATION - ARTISAN PARK

LAKESIDE PLANTATION COMMUNITY DEVELOPMENT DISTRICT

ATTN: Board of Directors

October 2021

Thank you for inviting Evergreen Lifestyles Management to provide a professional management proposal. We are excited about the prospect of serving this community. Our proposal has been prepared to demonstrate Evergreen Lifestyles Management's commitment to providing the highest degree of customer service, financial accuracy, administrative efficiency, and a lifestyle that homeowners can be glad to call home.

With a thorough evaluation, we propose the following for your review:

ASSOCIATION MANAGEMENT

Management Fee	\$3,500 per month
Onsite Staffing FT Community Manager, FT Clubhouse Manager, FT & PT Lifestyles, FT Tennis Pro/Maintenance, FT Maintenance	Billed at hourly rate + 32% for payroll burden which covers taxes, benefits, payroll processing, etc.
Community Website Monthly Website Hosting, Maintenance & Updates	\$100 per month

SUPPLEMENTAL COSTS	AMOUNT	DESCRIPTION
Copies	\$0.15 ea	Made at Evergreen Corporate Office
Envelopes	\$0.10 ea	Additional charge if specialty size
Postage	Current Rate	
Coupon Books	N/A	
Statutory Agent Annual Fee	\$100.00	
Special Assessment Collections	N/A	

MISCELLANEOUS COSTS (OWNERS)	AMOUNT	DESCRIPTION
New Home Administrative Fee	N/A	
Resale Administrative Processing Fee	N/A	
Document, Statement, and Refinance Fees	N/A	
Lender PUD Statement	N/A	
Foreclosure Processing Fee	N/A	
Rebiling Fee	N/A	

CDD Management SCOPE OF SERVICES

While evaluating your community, we've identified specific items we would like to include in our standard scope of services. We feel these additional items would greatly benefit your community and attend to the communities' unique set of demands.

- Monthly Drive Through of Community
- Insurance Policy Management
- Vendor Contract Management
- Attend max of six (6) Board and/or Committee Meetings per year

STANDARD MANAGEMENT SERVICES

- Faxes
- File Folders
- Office Supplies (at cost if applicable)
- Reminder Letters
- After-hours Emergencies
- Interfacing with Attorneys for Collection Matters
- Storage of Records
- Bank Charges
- Violation and Compliance Letters*
- Litigation/Attorney Interface
- Tracking Board Meeting Minutes & Resolutions
- Track Recorded Deeds
- Maintenance of Association Corporate Records
- Board & General Correspondence*
- Coordination of Maintenance & Repairs
- Oversight of Landscape & Irrigation Maintenance within Common Areas and Individual Lots
- Oversight of Any Additional Home Specific Services Paid Through and Managed by the Association
- Prepare Bid Specifications
- Securing Competitive Bids
- Assist BOD in Enforcing Community Governing Documents
- Manage Vendors & Contractors
- Manage Insurance Coverage
- Process Architectural Requests
- Vantaca Software System
- Coordinate Board & Annual Meetings*
- Committee Assistance
- Coordination of Homeowner Mailings*
- Board Training
- Quarterly Topical Board Training
- Reminder Letters (Late Notice)
- Coordination of Vendor Emergency Contacts
- Cell Phone Access
- Website Preparation Hosting
- Accounting
- Degreed Property Accountants
- CPA/MDA Financial Statement Oversight
- No Bank Charges
- Weekly Invoice Review & Payment
- Coordinate & Manage Reserve Study
- Coordinate Tax Returns
- Annual Florida Division of Corporation Filings
- Review & Payment of Property Taxes
- Coordinate Annual Audit, Review or Compilation
- Maintain Bank Accounts
- Assess Late Charges, Fines
- Secure Lockbox Processing for Assessments
- Daily Lockbox Processing for Receipts
- Financial Statements
- Daily Lockbox Posting to Owner Accounts
- Indexed/Searchable Electronic Financial Statements
- Balance Sheet
- Income/Expenses/Budget Comparison Report
- Delinquency Reports
- General Ledger
- Cash Receipts/Disbursements
- Electronic Copies of All Invoices & Checks
- Annual Budget Preparation
- Reserve Statements
- Variance Reporting
- Full Supporting Documents
- Bank Statements
- Auxiliary Schedules
- Monthly Sales & Use Tax Filing



EVERGREEN
LIFESTYLES MANAGEMENT



**INSURANCE
CERTIFICATE**



EVERLIF-01

D2MEVANS

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

7/01/2021

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).

PRODUCER License # L077730 AssuredPartners, Lake Mary 300 Colonial Center Parkway, Suite 270 Lake Mary, FL 32746		CONTACT NAME: PHONE (A/C, No, Ext): (407) 982-4451 FAX (A/C, No): E-MAIL ADDRESS: INSURER(S) AFFORDING COVERAGE INSURER A : Westfield Insurance Company NAIC # 24112 INSURER B : Lloyd's of London INSURER C : INSURER D : INSURER E : INSURER F :	
INSURED Evergreen Lifestyles Management, LLC 2100 S Hiawasse Road Orlando, FL 32835			

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 SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	☒ COMMERCIAL GENERAL LIABILITY CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☒ POLICY ☐ PROJECT ☐ LOC OTHER:		CWP8153453	7/28/2021	7/28/2022	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 500,000 MED EXP (Any one person) \$ 1,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
A	AUTOMOBILE LIABILITY ☒ ANY AUTO OWNED AUTOS ONLY ☒ HIRED AUTOS ONLY ☒ SCHEDULED AUTOS ☒ NON-OWNED AUTOS ONLY		CWP8153453	7/28/2021	7/28/2022	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	☒ UMBRELLA LIAB EXCESS LIAB DED ☒ RETENTION \$ 0	☒ OCCUR ☐ CLAIMS-MADE	CWP8153453	7/28/2021	7/28/2022	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000 \$
WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) ☐ Y / N ☒ N / A If yes, describe under DESCRIPTION OF OPERATIONS below						PER STATUTE E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Property		CWP8153453	7/28/2021	7/28/2022	SEE NOTES
B	Professional Liabili		TBD	7/28/2021	7/28/2022	Per Claim 2,000,000

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

CERTIFICATE HOLDER

CANCELLATION

	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



EVERGREEN
LIFESTYLES MANAGEMENT



**SAMPLE
TRANSITION
TIMELINE**



New Management Account Transition

Knowing and understanding the product and being clear on what was sold will lead to the successful transition of a new account. The following outlines information needed to begin a new management account transition in order to be successful. Special needs should be reviewed with Department Managers in advance to be certain that they can be accomplished. Problems or challenges should also be communicated early for assistance or guidance.

1. A copy of the fully executed management agreement reflecting the correct and full name of the community according to the Articles of Incorporation, which is then verified against the corporate name listed on the State Corporation Website (Division of Corporations).
2. A copy of the filed Articles of Incorporation is needed in order to open bank accounts.
3. Federal I.D. number. A copy of the Community's SS-4 form (issued by the IRS when original FID is assigned), or a copy of the Community's most recent tax return. This information is also needed in order to open a bank account. Do not rely on what the Division of Corporation reflects as the number can be incorrect or reflect that of the Developer or another business entity.
4. Type of Community, i.e., HOA, POA, PUD, Co-Op, Condo, Commercial, etc.
5. A complete set of the governing documents including articles, bylaws, declaration, along with any and all amendments and supplements, easements of record, and any existing shared use agreements with the community. Copies of recorded plats (not site plans) are also needed. If the project is a Florida condominium association, a copy of the developer's prospectus will be needed if the developer still holds title to any units for sale. The prospectus contains information as it pertains to the capital contribution which may not be outlined in the Declaration. All of these documents provide the insight as to how the community is to function and operate.
6. With exception of Florida Condominiums, check recording date of all Florida HOA, POAs, PUDs to make sure that they are in compliance with MARTA (Marketable Record Title Act). If documents are nearing the 30-year mark, they must be "reaffirmed". If documents are expired, they must be "re-established" which can be a timely and costly process.
7. The name of the Developer which can be found in the Declaration. If Subsequent Developer, a recorded copy of the assignment of Declarant rights will be needed.
8. Operating year – Calendar or Fiscal. Assessment billings and financial preparation depend on this information being accurate. This information is generally found in the bylaws, but tax returns being filed will reflect the correct information, even if the tax return conflicts with the governing documents.

9. Current owners Roster by lot or unit, including property address, mailing address, phone numbers and email addresses (excel format preferred). This includes all lots or units platted or in existence to date, including those owned by the developer and/or builders. Additional lots and units will be added as they are platted and/or subjected to the governing documents. Lots/Units not properly subjected to declaration may not be subject to them or the payment of assessments.
10. A report outlining any parking and/or storage assignments and if assignments are issued, a copy of those assignments will be needed especially if they are not recorded or are not appurtenant to the owners property/legal description.
11. Current year's budget which should reflect the operating year, number of units/lots upon which it is based in addition to the assessment amount and frequency. Florida condos require budgets to include reserve calculations.
12. Information regarding any special assessments in progress or in the process of being passed. Information regarding any additional assessments such as parking/storage fees, master association assessments, utilities, etc.
13. Copy of the last completed financial including most recent balance sheet, and an income statement.
14. A current and complete Year to Date General Ledger.
15. Copies of any insurance policies including termite bonds outlining current coverages and name of agent. This information should also include Pre-paid or expensed payment schedules.
16. Name and contact information for the attorney used for both general counsel and/or collection activity.

Additional items needed

1. Vendor/Contractor names with contact information including Insurance Certificates and completed W9's.
2. Schedule of community staffed employees for Human Resources to include year to date payroll reports, hours and rate of pay.
3. Owner Accounts Receivable history including assessment fee schedule if assessments vary.
4. Owner files to include correspondence, violations, architectural approvals/denials, return mail, etc.
5. Board Member names/contact information along with terms and their expirations. Copies of Board Member Certifications should also be obtained if available and applicable.
6. Committee Member names/contact information.
7. Copies of any outstanding ARC/ARB matters for approval.

8. Copies of any outstanding Covenant Violation matters.
9. Did prior management utilize any type of ACH program? If so, a list is needed of those owners.
10. Schedule of Utilities paid along with list of Utility Meters and their account numbers.
11. Copies of any Operating Permits I.e. Pool/Clubhouse/Elevator Operating Permits.
12. Rules and Regulations and/or any signed Resolutions.
13. Meeting minutes including Annual Meeting minutes.
14. Copy of most recent Annual Audit Report.
15. Status Report of any and all pending legal matters including general and collection along with copies of Intent to Liens, original Liens filed, and any demand letters that include copies of their receipt confirmation. Collection attorney information should include a current status report of any open/pending collection matters including foreclosure and bankruptcy matters.
16. Any other documents as required and outlined as an Official Record of the community as defined in FS:720.307(4) or FS:718.111(12). All records obtained should date back at least seven years or back to inception if community is still under developer control.

YOUR COMMUNITY.
YOUR HOME.
YOUR EVERGREEN.



*2100 S. Hiawassee Rd.
Orlando, FL 32835*

*877-221-6919
www.Evergreen-LM.com*

**LAKESIDE PLANTATION
COMMUNITY DEVELOPMENT DISTRICT**

On-Site Amenity Management Services

Request for Proposal No. 2021-100

PROJECT MANUAL

ISSUE DATE: SEPTEMBER 17, 2021

Proposals Must be Submitted No Later than

2:00 pm

October 13, 2021

**LAKESIDE PLANTATION
COMMUNITY DEVELOPMENT DISTRICT**

**REQUEST FOR PROPOSAL NUMBER 2021-100
ON-SITE AMENITY MANAGEMENT SERVICES**

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**LAKESIDE PLANTATION
COMMUNITY DEVELOPMENT DISTRICT
NOTICE OF SOLICITATION FOR REQUEST FOR PROPOSALS**

**ON-SITE AMENITY MANAGEMENT SERVICES
NORTH PORT, FLORIDA**

Notice is hereby given that the Lakeside Plantation Community Development District (referred to herein as the “District” or the “Owner”) requests proposals to provide On-Site Amenity Management Services (Request for proposals 2021-100) including but not limited to, managing the District’s amenity facilities, providing recreational programming, managing the landscape and pond maintenance contracts, managing the security contracts and other duties as more specifically set forth in the project manual.

The project manual, comprised of proposal and contract documents, will be available for public inspection and may be obtained beginning September 17, 2021, at 5:00 p.m., from the District Manager’s office, Governmental Management Services, Central Florida, LLC, 219 East Livingston Street, Orlando, Florida 32801 or by contacting Tricia L. Adams, District Manager at 407-841-5524 extension 138.

Firms desiring to provide services for this project must submit seven (7) copies of the required proposal no later than October 13, 2021 at 2:00 p.m. to the office of the District Manager, Governmental Management Services, Central Florida, LLC, 219 East Livingston Street, Orlando, Florida 32801 or via electronic mail to tadams@gmscfl.com. Proposals received after the time and date stipulated may not be accepted by the District.

Ranking of Proposers will be made in accordance with the criteria set forth in the Request for Proposals. The District reserves the right to reject any and all proposals, with or without cause, to waive minor technical errors and informalities, or to accept the proposal which, in its judgment, is in the best interest of the District.

Lakeside Plantation Community Development District
Tricia L. Adams, District Manager

LAKESIDE PLANTATION COMMUNITY DEVELOPMENT DISTRICT

REQUEST FOR PROPOSAL NUMBER 2021-100 ON-SITE AMENITY MANAGEMENT SERVICES

INSTRUCTIONS TO PROPOSERS

1. Due Date: Proposals must be received no later than **October 13, 2021 at 2:00 p.m.** at the offices of the District Manager, Governmental Management Services, Central Florida, LLC, 219 E. Livingston St., Orlando, Florida 32801 attention Tricia L. Adams or via electronic mail at tadams@gmscfl.com.
2. Signature on Proposal: In addition to executing all forms, affidavits, and acknowledgments for which signature and notary blocks are provided, the Proposer must correctly sign the Acknowledgment of Receipt and Proposal Signature Form. If the proposal is made by an individual, that person's name and business address shall be shown. If made by a partnership, the name and business address of an authorized member of the firm or partnership shall be shown. If made by a corporation, the person signing the proposal shall show the name of the state under the laws of which the corporation was chartered. Anyone signing the proposal as agent shall file with the proposal legal evidence of his authority to do so.
3. Familiarity with Laws: 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.
4. Qualifications of Proposer: The contract, if awarded, will only be awarded to a responsible Proposer who is qualified by experience 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 with the necessary organization, capital, and equipment to complete the work to the satisfaction of the Owner.
5. No Proposer shall submit more than one proposal. Proposers shall be disqualified and their proposals rejected if Owner 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 existing contract, or for failure to demonstrate proper licensure and business organization.
6. Interpretations and Addenda: All questions about the meaning or intent of the proposal documents are to be directed in writing to the District Manager. Interpretations or clarifications considered necessary by the District Manager in response to such questions will be issued by Addenda mailed or delivered to all parties recorded as having received the proposal documents. Questions received less than seven (7) days prior to the date of opening of proposals may not be answered. Only questions answered by formal written Addenda will be binding. No interpretations will be given verbally. All questions and answers will be distributed to all Proposers.

7. **Submission of Proposal:** Submit seven (7) copies of the proposal forms and other requested attachments at the time and place indicated herein, which shall be enclosed marked with the project title and name and address of the Proposer and accompanied by the required documents. If the proposal is sent through the mail or other delivery system, the sealed envelope shall be enclosed in a separate envelope with a notation (RESPONSE TO PROPOSAL NO. 2021-100 ENCLOSED) on the face of it. Electronic submissions are accepted via electronic mail to tadams@gmscfl.com.

8. **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 due date for a period of sixty (60) days.

9. **Proposal Documents:** The Request for Proposal will be available September 17, 2021 from the office of the District Manager Governmental Management Services, Central Florida, LLC, 219 E. Livingston St., Orlando, Florida 32801 attention Tricia L. Adams.

10. **Proposal Form:** All blanks on proposal forms must be completed in ink or typewritten. The proposal shall contain an acknowledgment of receipt of all Addenda (the numbers of which must be filled in on the Acknowledgment Form). 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, including verification of contents of proposal package against the Table of Contents.

11. **Basis of Award/Right to Reject or Award:** The Owner 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 appropriate.

12. **Contract Award:** Within fourteen (14) days of receipt of the Notice of Award, the Proposer shall enter into and execute the Contract in substantially the form included in the proposal documents. The District is seeking an amenity management company that can assume all amenity management responsibilities no later than November 1, 2021.

13. **Pre-Proposal Conference:** No pre-proposal conference will be held. However, Proposers are encouraged to make on-site visits to the area for which services are required in order to gain an understanding of the scope of the area to be served. The Proposer is assumed to be familiar with the area and any natural features which will in any manner affect the work. Ignorance on the part of the Proposer will in no way relieve it from responsibility. **Any on-site visits must be scheduled with the District Manager's Office, 219 E. Livingston St., Orlando, FL, by contacting Tricia L. Adams at 407-841-5524 extension 138 or via electronic mail at tadams@gmscfl.com. Proposers must have an escort arranged by District Manager's Office for any on-site visits.**

14. **Insurance:** All Proposers shall include as part of their proposal a current Certificate of Insurance detailing the company's insurance coverage and including the required minimum coverages and information as listed below. In the event the Proposer

is notified of award, it shall provide proof of Insurance Coverage within fourteen (14) calendar days after notification, or within such approved extended period as the Owner may grant. Failure to provide proper proof of insurance coverage shall constitute a default.

Minimum Limits

Commercial General Liability:	\$2,000,000 per occurrence
Automobile Liability:	\$2,000,000 per occurrence
Workers Compensation:	Statutory
Employers Liability	\$1,000,000

Please include the following on the certificate of insurance:

- Reference the Lakeside Plantation Community Development District and contract number on the certificate.
- All coverage must be written with an insurance carrier that has an A.M Best's Key Rating of at least A and a financial rating of VII.
- State additional insured on certificate and mark box with a "Y" for certificate holder as additional insured. Additional insured: *Lakeside Plantation Community Development District must be listed as an additional insured with respect to all coverage, except workers' compensation and employer's liability.*
- General liability must include contractual liability
- Waiver of subrogation: *"A Waiver of subrogation applies in favor of the Lakeside Plantation Community Development District with respects to all coverage."*
- A 30 day notice of cancellation is required.
- All Auto policies need to cover "any Auto" or "Hired, Non-Owned and scheduled".
- An authorized agent must sign the certificate.
- Certificate Holder MUST Read:

Lakeside Plantation CDD
Attn: District Manager
219 E. Livingston St.
Orlando, Florida 32801

15. Indemnification: The successful Proposer shall fully indemnify and hold harmless Owner, the District Manager and the District Engineer, from and against all claims, damages, costs and losses arising, in whole or in part, from Contractor's negligence or breach of contract, as more fully set forth in the Contract form, provided herein.

16. Limitation of Liability: Nothing herein shall be construed as or constitute a waiver of Owner's limitations on liability contained in section 768.28, Florida Statutes, or other statute or law.

17. All proposals shall include the following information in addition to any other requirements of the proposal documents:

- A narrative description of the Proposer's approach to providing the services as described in the scope of services, provided herein (limited to 5 pages).
- Proposer's organizational chart.
- List position or title and corporate responsibilities of key management or supervisory personnel. Include resumes for each person listed; list years of experience in present position for each party listed and years of related experience.
- Describe proposed staffing levels.
- A list and description of On-site Management contracts undertaken for each of the last three (3) years, including the scope of services provided, the name of the project owner and a contact name and phone number.
- A listing of the total annual dollar value of work, as described above under G, completed for each of the last three (3) years.
- List all other contracts related to the provision of services by the Proposer in which the company is presently engaged.
- Three References, including the name address and phone number of a contact person, from projects of similar size and scope. The references may, but are not required to, overlap with projects or current contracts as listed under E and G.
- Current certificates of insurance including certificates for any sub-contractors that will be used.
- A list of any and all lawsuits that the Proposer is or has been a party to in the past five (5) years.
- A list of any and all licensure disciplinary actions the Proposer or its employees is or has been a party to in the past five (5) years.
- Completed copies of all other forms included within the proposal documents

18. Any protest regarding the Proposal Documents, including specifications or other requirements contained in the Request for Proposal, must be filed in writing within seventy-two (72) hours after the receipt of the proposed project plans and specifications or other contract 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 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 plans, specifications or contract documents.

19. The proposals shall be ranked based on the Owner's evaluation of the Proposer's ability to perform the services for the project as demonstrated by the documentation provided by the Proposer and reference checks of the Proposer's clients. The criteria to be used in the evaluation are presented in the Evaluation Criteria sheet, contained within the proposal documents.

LAKESIDE PLANTATION COMMUNITY DEVELOPMENT DISTRICT

**REQUEST FOR PROPOSAL NUMBER 2021-100
ON-SITE AMENITY MANAGEMENT SERVICES**

EVALUATION CRITERIA

1. Personnel (25 points)

(E.g., geographic locations of the firm's headquarters or office in relation to the project; adequacy and capabilities of key personnel, including the project manager and field supervisor; present ability to manage this project; evaluation of uncompleted work load; proposed staffing levels, etc.)

2. Experience (25 points)

(E.g., past record and experience of the respondent in managing similar public amenities and services; volume of work previously awarded to the firm; past performance for the District in other contracts; character, integrity, reputation, of respondent, etc.)

3. Understanding of Scope of Work (25 points)

Does the proposal demonstrate an understanding of the District's needs for the services requested?

4. Financial Capability (10 points)

Demonstration of financial resources and stability as a business entity, necessary to complete the services required.

5. Price (15 points)

Points available for price will be allocated as follows:

10 points will be awarded to the Proposer submitting the lowest total bid for completing the work for the initial two-year term of the contract. All other proposals will receive a percentage of this amount based upon the difference between that Proposer's bid and the low bid.

5 points are allocated for the reasonableness of all prices.

LAKESIDE PLANTATION COMMUNITY DEVELOPMENT DISTRICT

BASIC ORGANIZATION INFORMATION

DATE SUBMITTED October 13th, 2021

1. Proposer Evergreen Lifestyles Management / / An Individual
[Company Name] /X/ A Limited Liability
Company
/ / A Limited Liability
Partnership

/ / A Partnership
/ / A Corporation
/ / A Subsidiary
Corporation

2. Proposer Company Address:

Street Address 2100 S. Hiawassee Road

P.O. Box (if any) _____

City Orlando State FL Zip Code 32835

Telephone 877-221-6919 Fax no. _____

1st Contact Name Janie Linscott Title Director of Business Development

2nd Contact Name Jared Widman Title Vice President of Business Development

3. Parent Company Name (if applicable)

4. Parent Company Address (if different):

Street Address _____

P.O. Box (if any) _____

City _____ State _____ Zip Code _____

Telephone _____ Fax no. _____

1st Contact Name _____ Title _____

2nd Contact Name _____ Title _____

5. List the location of the Proposer's office which would perform LSPCDD work.

Street Address 9040 Town Center Parkway

P.O. Box (if any) _____

City Lakewood Ranch State FL Zip Code 34202

Telephone 877-221-6919 Fax no. _____

Electronic Mail _____

1st Contact Name Andrea Bull Title Regional Manager

6. If the Proposer is a corporation, is it incorporated in the State of Florida?

Yes (X) (Proceed to Question 6.1) No () (Proceed to Question 6.2)

6.1 If yes, provide the following:

Is the Company in good standing with the Florida Secretary of State Division of Corporations? Yes (X) No ()

If no, please explain:

Date incorporated 2010 Charter No. _____

6.2 If no, provide the following:

The State in which Proposer is incorporated? _____

Is the Company in good standing with that State? Yes () No ()

If no, please explain:

Date incorporated _____ Charter No. _____

Is the applicant registered with the State of Florida? Yes () No ()

7. If the Proposer is a partnership (including a limited partnership or limited liability partnership) or limited liability company, is it organized in the State of Florida?

Yes (X) (Proceed to Question 7.1) No () (Proceed to Question 7.2)

7.1 If yes, is the Proposer registered with the Florida Department of State, Division of Corporations? Yes (X) No ()

If no, please explain:

Is the Proposer in good standing with the State of Florida? Yes (X) No ()

If no, please explain:

Date Proposer was organized: 2010

7.2 If no, provide the following:

The State in which Proposer is organized: _____

Is the Proposer in good standing with that State? yes () no ()

If no, please explain:

Date Proposer was organized: _____

Is the Proposer registered as a foreign partnership or limited company with the State of Florida? Yes (X) No ()

If no, please explain:

8. Does Proposer hold any registrations or licenses with the State of Florida applicable to the contract?
Yes (X) No ()

8.1 If yes, provide the following information and attach one (1) photocopy of each listed license (attach additional sheets if necessary):

Type of registration Business License

License No BUS-1017277 Expiration Date 9/30/2022

Qualifying individual _____ Title _____

List company(s) currently qualified under this license _____

Evergreen Lifestyles Management, LLC

8.2 Does the Proposer hold any registrations or licenses with Sarasota County applicable to the contract? Yes () No (X)

If yes, please list and provide a photocopy of each listed license or registration:

9. List the Proposer's total annual dollar value of work completed for each of the last three (3) years starting with the latest year and ending with the most current year

10. What are the Proposer's current insurance limits? (Provide a copy of applicant's

Certificate of Insurance) See attached Certificate of Liability Insurance

General Liability	\$ _____
Automobile Liability	\$ _____
Workers Compensation	\$ _____
Expiration Date	_____

11. Has the Proposer been cited by OSHA for any job site or company office/shop safety violations in the past two years? Yes () No (X)

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

11.1 What is the Proposer's current worker compensation rating? _____

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

If yes, please describe each incident: _____

The undersigned hereby authorize(s) and request(s) any person, firm or corporation to furnish any pertinent information requested by the Lakeside Plantation Community Development District, or their authorized agents, deemed necessary to verify the statements made in this application or attachments hereto, or regarding the ability, standing and general reputation of the applicant.

Evergreen Lifestyles Management, LLC
Name of Proposer

By: Janie Linscott

This 13th day of October, 2021
[Type Name and Title of Person Signing]

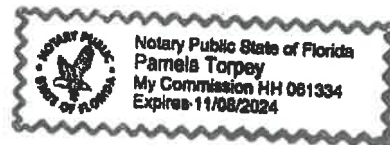
By: Janie Linscott

(Apply Corporate Seal, if filing as a corporation)

State of Florida
County of Sarasota

The foregoing instrument was acknowledged before me this 13th day of October, 2021, by Pamela Torpey, of the Evergreen Lifestyles Management, LLC who is personally known to me or who has produced _____ as identification and who did (did not) take an oath.

Pamela Torpey
Signature of Notary taking acknowledgment



LAKESIDE PLANTATION COMMUNITY DEVELOPMENT DISTRICT

AFFIDAVIT OF NON-COLLUSION

STATE OF Florida
COUNTY OF Sarasota

I Janie Linscott, do hereby certify that I have not, either directly or
Director of Business
indirectly, participated in collusion or proposal rigging. Affiant is a Development in the
firm of Evergreen Lifestyles Management, LLC, and authorized to make this affidavit
on behalf of the same. I understand that I am swearing or affirming under oath to the
truthfulness of the claims made in this affidavit and that the punishment for knowingly making a
false statement includes fines and/or imprisonment.

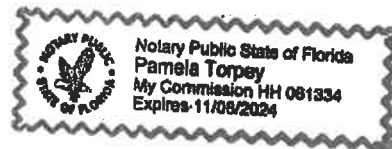
Dated this 13th day of October, 2021.

Janie Linscott
Signature by authorized representative of Proposer

State of Florida
County of Sarasota

The foregoing instrument was acknowledged before me this 13th day of October, 2021, by
Pamela Torpey, of the Evergreen Lifestyles Management, LLC who is personally known to
me or who has produced _____ as identification and who
did (did not) take an oath.

Pamela Torpey
Signature of Notary taking acknowledgment



LAKESIDE PLANTATION COMMUNITY DEVELOPMENT DISTRICT

**ACKNOWLEDGMENT OF RECEIPT OF DOCUMENTS
AND PROPOSAL SIGNATURE FORM**

This Proposal for on-site management has been submitted on this 13th day of
October, 2021 by Evergreen Lifestyles Management whose business address is
2100 S. Hiawassee Rd
Orlando, FL 32835, telephone number is 877-221-6919, and
fax number is ---.

The undersigned acknowledges, by the below execution of this proposal, that all information provided herein has been provided in full and that such information is truthful and accurate. Proposer agrees through submission of this Proposal to honor all pricing information sixty (60) days from the date of the Proposal opening, and if awarded the contract on the basis of this Proposal to enter into and execute the services contract in substantially the form included in the proposal documents.

Proposer understands that inclusion of false, deceptive or fraudulent statements on this proposal constitutes fraud; and, that the District considers such action on the part of the Proposer to constitute good cause for denial, suspension or revocation of a proposal for work for the Lakeside Plantation Community Development District.

Furthermore, the undersigned acknowledges receipt of the following addenda agenda, the provisions of which have been included in this Request for Proposal.

Addendum No. _____ dated _____

Addendum No. _____ dated _____

Addendum No. _____ dated _____

Addendum No. _____ dated _____

Addendum No. _____ dated _____

SCOPE OF SERVICES/PROJECT MANUAL

PROJECT SCOPE

The Contractor shall provide On-site Amenity Management Services for the Lakeside Plantation Community Development District.

1.1 General Overview

Lakeside Plantation Community Development District (“The District or Owner”), located in Sarasota County, is a master planned community with amenities such as a community clubhouse, swimming pool, fitness center, billiard room, bocce court, pickleball/basketball court, playground, tennis court, and sidewalks throughout the community.

1.2 Community Development Districts (CDD) Development

The District is an independent unit of local government created and established in accordance with the Act. The Act was enacted in 1980 and is provided for in Florida Statutes Chapter 190. It provides a uniform method for the establishment of independent districts to manage and finance basic community development district services.

GENERAL CONTRACTOR REQUIREMENTS AND PROCEDURES

The Contractor shall meet the requirements and follow the procedures associated with all items in this Agreement. These general requirements and procedures are as follows:

2.1 Operation Procedures

The Contractor shall perform the basic services outlined within the Scope of Services at the hours and days requested by the Owner.

2.2 Key Personnel

All Work shall be managed and/or directed by key personnel identified in the proposal. Where applicable, the Contractor shall require certifications, training, etc. be secured and updated for all employees. Contractor shall provide one (1) Community Director/Amenity Manager who is knowledgeable of the Contractor’s daily activities when performed at the site. This Director shall serve as the point of contact between the Owner and Contractor. The Director shall be responsible for coordinating all scheduled services with the Owner. The Director shall be responsible for overseeing all amenity management administrative, maintenance, and recreational personnel, security attendants, landscape and pond maintenance contracts. Should a problem arise, the Community Director shall present the problem to the Owner for direction.

2.2.1 The Contractor shall provide staff for the following responsibilities:

Community Director/Amenity Manager, Office Management Staff, Lifestyle & Communications Staff, Tennis Personnel, and Maintenance Personnel

2.2.2 Contractor's duties

In addition to the responsibilities found in section 4 of this scope of services, the following duties are required of the Contractor:

Tactfully communicate with residents regarding issues handled by the Contractor

Investigate and resolve complaints and concerns from residents

Understand and ensure compliance with federal, state and local legislation relevant to Community Development District and planned communities

Assume responsibility for operations and maintenance of all amenities including, but not limited to community pool and spa, playground, fitness center, bocce court, tennis courts, pickleball/basketball court, billiard room, library and clubhouse

Assume responsibility for operations and maintenance of all common areas, sidewalks, fountains, parking areas, and storage areas

Assume responsibility for management of the security contract for common areas, parking areas, storage areas, amenities and clubhouse

All aspects of the product and supply ordering process in order to maintain all supplies at a proper level

Attend and speak at new resident orientation meetings or other community information meetings

Facilitate staff meetings to discuss upcoming events, District policies, personnel development and pertinent issues

Maintain contact with the Owner on an as needed basis

Coordinate all scheduled services with the Owner

Oversee the janitorial and maintenance of clubhouse and amenities

Oversee and manage the landscape and pond maintenance contracts

Implement and maintain a safety program for the staff and residents

Deliver by mail or electronic mail all records to Owner

Gather feedback from residents and guests and create improvement plans based on feedback

Ensure accurate records (such as incident reports, accident reports, maintenance records) are maintained for insurance purposes

Oversee, manage, train and develop amenity management, recreational, and maintenance/janitorial personnel

Oversee all aspects of room rental process, including scheduling and planning, working with clients, drafting contracts, collecting fees, and gathering feedback from events

Oversee all aspects of tennis membership program including gathering fees, maintaining records, court scheduling, and promoting compliance with tennis policies

Work closely with resident organizations and volunteers for the planning and executing of social events

Interview and hire for certain recreational vendors or programs

Process all accounts payable and accounts receivable associated with District services

Layout, design and maintain tickets, seating charts and other activities materials

Maintain promotional flyers and registrations at Club Office

Facilitate electronic news messages and electronic newsletters

Continuously monitor the facilities and amenities. Document and report incidents to the Owner

Maintain an online resident directory

Promote voluntary compliance with District policies. Facilitate progressive discipline for those who fail to abide by District policies

Owner reserves the right to adjust these requirements as needed

2.3 Personnel Dress Code

The Contractor shall ensure that employees working on the Project shall wear uniforms or professional attire at all times. Clothing that expresses or implies obscene language or graphics, degrading or demeaning connotations, or in the opinion of the Owner is unsightly for any reason, shall be strictly prohibited. Contractor personnel

shall wear proper attire at all times and shall wear footwear that conforms to safe work practices.

2.4 Personnel Conduct

The Contractor shall enforce strict discipline and good order among its employees on the Project site. The Contractor shall ensure that its employees communicate and interact with the Lakeside Plantation community and any other customer/party associated with the Lakeside Plantation Project are knowledgeable of the Project and the Services the Contractor is performing.

2.5 Safety Program

The Contractor shall develop, implement, and maintain a safety program for its operations on the Project. That safety program shall include, at a minimum, a safety policy, safety rules, safety training, safety evaluations, safety operations, and procedures for accident investigations, providing and maintaining equipment safety features, and safety record keeping. It is mandatory all employees have adequate safety knowledge and demonstrate ability to abide by and promote the safety program. Once an employee has completed safety training, the contractor should provide training certificates for each employee.

2.6 Facility Location

The Owner shall only provide office space on the Project site for the Contractor as part of this Scope of Services.

2.7 Document Control and Data Maintenance

Administrator's Records

The Contractor shall keep accurate records of all incidences that occur while on duty, documents received, and if applicable, issued by this Contractor. The Contractor shall keep records of important passwords, vendor directory, maintenance checklists and other documentation important to the day to day operation of the District.

2.8 Liability Insurance

Contractor shall, throughout the performance of its Services pursuant to this Agreement, maintain: Occurrence basis comprehensive general liability insurance (including a broad form contractual coverage) with minimum limits of \$2,000,000.00 respectively, protecting it and Owner from claims for bodily injury (including death) and property damage which may arise from or in connection with the performance of Contactor's Services from or out of any act or omission of Contractor, its officers, directors, agents, and employees.

COORDINATION

The Contractor shall provide coordination with the Owner for all items associated with the requirements of this Agreement.

General Coordination

The Contractor shall meet with the Owner on a regular basis. The schedule will be determined by the Owner but will likely be monthly. Those meetings shall serve as a forum for the exchange of information, identification of pertinent and critical issues, determination of an action plan and schedule for resolving those issues, review of schedule, and budget status. The Contractor shall prepare the agenda for those meetings and submit it to the Owner two (2) working days prior to the date of each meeting. The Contractor shall record and distribute minutes of each meeting to all attendees within five (5) business days, as needed. The Owner shall provide the meeting location which may be a virtual meeting format.

In addition, Contractor shall provide a representative to attend the community meeting of the Lakeside Plantation Board of Supervisors. This representative shall be knowledgeable of this Project Scope and Scope of Services and shall be able to respond to any questions the Board may have as to the day-to-day activities at the Project site pursuant to this Agreement; moreover, prepare status reports for the Board per the timeline provided by the District Manager's office.

Contractor's Community Director

Contractor shall designate a representative who will be responsible for overall supervision of the Contractor's work force on the Project and shall act as the single point of contact, on an as needed basis, between the Owner and the Contractor. This individual shall be responsible for overseeing all aspects of amenity management. The Community Director will supervise and facilitate vibrant resident lifestyle opportunities including an array of social, educational, recreational and wellness activities. High quality and timely communication with residents using electronic newsletter, electronic messaging, online resident directory and community meetings will be supervised by the Community Director. Maintaining a clean and safe environment and promoting compliance with District policies are of utmost importance. The Community Director is to ensure all staff and vendor efforts align with these goals.

SCHEDULED OPERATIONS

Activities

Contractor shall provide social, wellness, and entertainment activities on a weekly and monthly basis. The Contractor will be responsible for the research, production, scheduling, organization, promotion, and monitoring of a broad range of activities for the residents of the Lakeside Plantation community. At the end of each activity, the Contractor should gather feedback from participants. Contractor shall evaluate the

effectiveness of each activity, compile, and implement improvement plans for future activities. The Contractor shall develop and design promotional flyers, seating charts and other materials for specific activities. The Clubhouse Office will provide information, registration of activities and attend to the needs of residents. The Clubhouse Office staff should answer telephone calls, process incoming and outgoing mail and electronic mail for the community. A schedule of activities must be kept current for Lakeside Plantation and posted in proper locations within the community. There will be a monthly electronic calendar for the residents and included within the monthly electronic newsletter. Activity rooms will be scheduled, designed and setup prior to each activity. Staff should facilitate community meetings to present upcoming activities and community news. Staff should gather suggestions from residents for future activities and community improvements on a regular basis. Knowledge of the audio/video equipment is required; furthermore, training volunteers and staff to properly use the equipment is required.

Events

The Contractor shall develop, schedule, promote, plan and facilitate all events for Lakeside Plantation. Events will include banquets, socials, parties, holiday activities, receptions, and other special events. At the end of each event, the Contractor should gather feedback and evaluate success of each event, staff and other resources; furthermore, compile, and implement improvement plans for future events. The Contractor shall develop and design promotional flyers, seating charts and other materials for special events. Knowledge of the audio/video equipment in the clubhouse is required; furthermore, training volunteers and staff of the equipment is required. The Contractor will be responsible for ensuring that the Clubhouse and all amenities is secure and locked down on a nightly basis.

Clubhouse Availability

The Contractor will ensure that the Clubhouse will be open for residents and guests seven (7) days per week throughout the year, notwithstanding emergency situations. The Clubhouse Office will be closed on holidays including New Year's Day, Memorial Day, 4th of July, Labor Day, Thanksgiving and Christmas.

Online Resident Directory & District Website

The Lakeside Plantation online resident directory is the responsibility of the Contractor. The Contractor will supervise and maintain the content and technical aspects of the resident directory. The Contractor will assist with monitoring and updating the District website.

Monthly Electronic Newsletter and Electronic Message Blasts

The Lakeside Plantation electronic monthly newsletter is the responsibility of the Contractor. The Contractor will supervise, design, edit, publish and maintain the content of the electronic newsletter. At all times the newsletter content should contain

community amenity news, recreational programming information, community information, special events, and activities. In addition, the contractor is expected to maintain all the technical aspects of the newsletter while implementing new material, graphics and updating content. The Contractor must maintain a current mailing list of resident subscribers. A representative from the newsletter should attend community meetings, present ideas, share articles and attain information to be included in the newsletter. Electronic mail messages promoting activities, alerting residents to important maintenance news or other information that impacts residents at Lakeside Plantation will be sent as often as needed. All resident communications are expected to be free from grammar and spelling errors.

Community Meetings

The Contractor will schedule community information meetings. The purpose of these meetings is to highlight and outline the activities provided by Lakeside Plantation Community Development District for the Lakeside Plantation residents. These meetings can also serve as an orientation time for new residents to the community. Contractor's staff should present activities and information about Lakeside Plantation, community events, and provide thorough and logical answers to resident questions. Representatives, when possible, should be available to present new programs within the community for residents to participate.

Contract Management

The Contractor will be solely responsible for managing the contracts of the Lakeside Plantation Community Development District to include the provision of security, pond maintenance, pool maintenance, landscape services and any other contract related to recreational services and maintenance at Lakeside Plantation Community Development District.

ADMINISTRATION/OPERATIONS

The Administration and Operations program shall be kept up-to-date at all times by the Contractor. Revisions to the document shall be indicated by footnote on the revised pages. Revisions shall be distributed by the Contractor to all document holders.

The Contractor shall prepare draft copies of the document for review and comment by the Owner within ten (10) calendar days of the notice to proceed with the Services.

Administration

5.1.1 The administrative section of the document shall, at a minimum, address those functions, which are the responsibility of the Contractor related to all administrative matters generally described in the Scope of Services and as outlined below. Organizational charts for administrative management functions include key personnel

names, job titles, electronic mail addresses, and phone numbers.

Policies and procedures related to the Contractor's program for communications with the Lakeside Plantation community relative to operations and customer service.

Personnel policies and procedures related to the Contractor's personnel performing services on the Lakeside Plantation site.

Maintenance Checklists including daily, weekly, monthly and annual maintenance requirements at Lakeside Plantation.

Hurricane and Severe Weather Preparedness Plan for community readiness.

Emergency Preparedness Plan to address natural or other disasters.

Vendor Directory including all necessary contact information for vendors providing supplies or services to the District.

Basis for Compensation and Payment

The Contractor shall be compensated for rendered services set forth herein at such time the Lakeside Plantation Community Development District receives revenues from the Sarasota County Tax Collector's Department. Notwithstanding the above, it is anticipated that the Owner and Contractor would enter into a lump sum contract whereby the Contractor would be paid in monthly installments.

5.2.1. Work Authorizations shall mean orders or directives, in the form attached hereto as Exhibit C, issued by the Owner. Work Authorizations shall be issued for repairs or emergency services, changes to the scope of the area in which services are required, or for any services beyond those set forth in Article 2. Services performed under a Work Authorization may be paid either on a lump sum basis, a unit price basis, or a time and material basis in the Owner's sole discretion, such amount to be invoiced and paid in accordance with the terms set forth in Article 5, and paragraphs b. and c. above. Contractor shall not be entitled to compensation for Services outside the scope of Article 2 unless Contractor has obtained prior written authorization of Owner to perform the same in accordance with the provisions of Article 8 of this Agreement.

5.2.2. Owner retains the right to reduce any portion of Contractor's Scope of Services as set forth in Article 2, or as amended in any Work Authorization, in accordance with the provision of Article 8 of this Agreement. In such event, Owner shall be entitled to a reduction proportionate to the Fixed Fee.

RESPONSE TIME

The Contractor shall provide services or a response to the request for service within twenty-four (24) hours of receipt. The following is general response time information

and requirements for the Emergency Response Program to be developed, implemented, and maintained by the Contractor.

General

The Contractor shall, on a timely and efficient basis, respond to any and all requests, and inspections, and observations, etc. stipulated in the Project Manual. The Contractor shall provide supervisory and operating personnel as required who shall be available on call 24 hours per day, 7 days per week to respond to and correct any problems with any of the elements covered by this Agreement.

Should the Contractor fail to respond to a request for any services addressed in this Project Scope within the required allotted time, the Owner should, at the Contractor's sole expense, provide the requested services.

END OF SCOPE OF SERVICES

SAMPLE SCHEDULE AND JOB DESCRIPTIONS

SAMPLE SCHEDULE

JOB TITLE	NUMBER OF POSITIONS	TOTAL NUMBER OF HOURS PER WEEK
Community Director/Amenity Manager	1	40 (salaried)
Club Office Manager	1	40 (hourly)
Lifestyle & Communications Staff	1	1 full time 40 (hourly) 1 part time 30 (hourly)
USTPA Tennis Pro/Maintenance	1	Court Maintenance 7 days per week; Other Tennis Pro Services As Needed
Maintenance	1	40 (hourly)

Clubhouse Hours of Operation:

Please note that the below schedule represents the current hours of operation and should be used for bidding purposes. However, hours of operation are subject to change based on mutual agreement with the contractor and District.

April to October:

9 am to 9 pm Tuesday through Saturday

Noon to 6 pm Sunday

9 am to 6 pm Monday

November to March

Monday through Saturday 9 am to 9 pm

Sunday noon to 9 pm

Tennis Courts maintained 7 days a week

SAMPLE JOB DESCRIPTIONS

TITLE: Community Director/Amenity Manager

REPORTS TO: Supervisor Amenity Management Company/District Manager

JOB SUMMARY:

Under the direction of the District Manager, plan, organize and direct a variety of services and programs for the District including clubhouse and amenity activities and events, security operations, facility rental, communications and resident services, facility, amenity, and landscape maintenance, conservation areas, retention pond and lake maintenance.

KNOWLEDGE, SKILLS AND ABILITIES:

Familiarity with essential community development district functions
Strong leadership and management abilities
Ability to react calmly and quickly in emergency situations
Ability to supervise and lead a team of employees
Ability to assist with budget preparation and to operate within a budget
Ability to investigate and tactfully resolve complaints from residents or other stakeholders
Ability to negotiate and manage contracts for services as needed
Ability to understand and ensure compliance with relevant federal, state and local legislation
Ability to assume responsibility for operations, maintenance and safeguarding of all amenities including, but not limited to tennis facilities, playground, community pool and spa, fitness center, bocce courts, pickleball/basketball courts, library, and clubhouse
Ability to manage internal and external media including but not limited to electronic newsletter publication, digital community directory, information meetings; foster positive relationship through vendor and community relations
Ability to establish and maintain effective working relationships with staff, board members, residents, volunteers, businesses and various community groups; ability to attend and facilitate small and large group discussions that may occur in the day, evening or weekend

EDUCATION AND EXPERIENCE:

A bachelor's degree in business administration, communication, recreational programming, public administration or a related field is required
Previous leadership experience is required
A proven record of successful media management and community relations is required
A proven record of successful facility management, property management and team management experience is required
Evidence of excellent speaking, writing and computer skills is required

ESSENTIAL DUTIES:

Maintain excellent level of resident service and satisfaction
Foster goodwill with residents, board members, contracted personnel, staff, volunteers and the business community by maintaining positive communications
Oversee property and amenity maintenance including, but not limited to community pool and spa, playground, fitness center, bocce court, library, pickleball/basketball facilities, playground, clubhouse, parking areas, storage areas, landscaping, roads, storm water system, lakes, retentions ponds, sidewalks and common areas
Recruit, hire, train, coach, manage and evaluate necessary employees
Investigate and comply with relevant federal, state, and local legislation
Communicate essential information to District Manager and/or Board of Supervisors; advise on recommended policy changes and community improvements

Work with District Manager as well as the Board of Supervisors to integrate new policies into operations; routinely review operations and procedures for efficacy
Consult with staff and others in government and private organizations to discuss issues, coordinate activities and resolve problems; serve as a liaison to other local governments and public agencies during the day, evening or weekend
Oversee research and implementation of activities programming for residents and guests
Oversee development, scheduling, marketing, promoting and facilitating special events
Communicate by writing, editing and publishing print and electronic media including monthly newsletters, promotional materials and communication with residents
Oversee maintenance and development of digital resident directory
Oversee maintenance of scheduled resident and rental activities
Evaluate the effectiveness of onsite management using research gathering tools
Facilitate information meetings with residents using public speaking skills
Coach resident members to assume leadership roles; oversee volunteer management
Manage various vendor contracts
Manage All Aspects of Special Maintenance or Capital Projects
Attend and present information at board meetings as needed
Communicate and train during staff meetings to ensure current efforts are aligned with Board goals and policies
Review, approve and present reports, studies and research relating to operational effectiveness
Administer, interpret and explain policies, rules, regulations and laws
Oversee continuous monitoring of clubhouse and amenities for safety, compliance with amenity policies and resident satisfaction
Landscape and pond inspections (weekly or more often if needed)
Review and approve accounts payable and receivable
Facilitate Landscape and Pond Maintenance Reports for Board of Supervisors Meetings
Safeguard District amenities and facilities
Oversee Amenity Access and Security Controls

WORKING CONDITIONS:

A portion of the workday may be spent away from an office overseeing community activities, maintenance and/or operations
May require evening and weekend hours
Must be available to properly address any emergency that may occur

TITLE: Clubhouse Office Manager
REPORTS TO: Community Director

JOB SUMMARY: To assist with aspects of amenity management with a special emphasis on clubhouse office management, records management, accounts payable, accounts receivable, managing room rental, and resident services.

KNOWLEDGE, SKILLS AND ABILITIES:

Ability to research, organize, and interpret data
Excellent oral and written communication skills
Essential computer skills using Microsoft Office software including Outlook, Word and Excel
Essential office equipment including copier, scanner, facsimile, telephone, credit card processor, and postage meter
Ability to file and organize information electronically and using traditional filing systems
Ability to foster goodwill while working with residents, volunteers, vendors, and other community stakeholders
Ability to prioritize workload and make decisions with little or no supervision
Have a can-do attitude, and be willing to assist wherever needed, and be committed to creating a great internal work environment

EDUCATION AND EXPERIENCE: Associate's Degree in Business preferred. A successful track record of office management is required with a preference for those who have experience with property management.

ESSENTIAL DUTIES:

Answer and manage incoming telephone calls
Receive, sort and process incoming mail and shipments
Assist residents with copying, faxing and scanning documents
Keep records of repairs, contractor visits and other facility maintenance
Maintain a database of facility maintenance vendors
Maintain digital resident directory and resident records
Provide facility rental information to inquiries
Keep records of upcoming room reservations/equipment rentals and collect room rental fees, security deposits and necessary forms
Keep record of tennis membership, collect tennis fees and necessary forms
Keep records of accounts payable information such as packing lists and contractor visits
Keep records of incoming revenue and prepare deposits and related reports
Communicate with residents by contributing to monthly newsletter and other internal media
Maintain inventory of office supplies, clubhouse supplies and kitchen supplies
Assist the Community Director with purchasing operating supplies and equipment
Assist the Community Director with evaluating the effectiveness of resident services using research-gathering tools
Implement new office procedures as needed
Review and analyze office expenses and supply purchases for cost savings measures and assist with budgeting and invoicing
Maintain employee time off requests, payroll records and support logistics efforts for staff meetings
Orchestrate appointments, meetings, schedules and contacts for Community Director
Assist the Community Director with investigating complaints, disturbances and violations and resolving the issues
Handle confidential information via electronic and hardcopy correspondence discreetly
Assist with monitoring amenities and operating security programs including access controls
Cross train with Lifestyle Staff to assist residents however needed

TYPICAL PHYSICAL DEMANDS:

Some bending, stooping and stretching Occasionally lifting items weighing up to 30 lbs.

Requires eye-hand coordination and manual dexterity sufficient to operate a keyboard, photocopier, telephone, calculator, and other office equipment

Requires normal range of hearing and eyesight to record, prepare, and communicate appropriate reports

Extensive data input and required ability to sit for long periods of time

TYPICAL WORKING CONDITIONS:

Normal office environment open seven days a week

Employees must be able to physically access all exterior and interior parts of the community and amenities

TITLE: Lifestyle and Communications Manager

REPORTS TO: Community Director

JOB SUMMARY:

Responsible for the efficient operation of Activities under the direction of the Community Director. Daily the Lifestyle staff performs the tasks associated with the operation of the community including resident services, activities coordination, event planning, communication and scheduling to ensure resident satisfaction. Be fully capable of producing error-free electronic and print publications to promote activities and lifestyle.

KNOWLEDGE, SKILLS AND ABILITIES:

Knowledge of organizational and community policies and procedures
Knowledge and understanding of business concepts
Ability to apply policies and procedures to solve issues
Proven exceptional communication skills both written and verbal
Ability to communicate effectively with residents, guests, vendors, contractors, and associates
Performs duties that require initiative and strong communication skills
Ability to respond to common inquiries or complaints
Ability to quickly develop strong internal working relationships
Demonstrated understanding of overall property management
Must know and follow best practices for office management techniques
Ability to manage multiple projects, set priorities, exercise sound judgment and clearly communicate findings and advice
Skilled in the use of the internet, spreadsheets, databases, and word processing software
Ability to process computer data and to format and generate reports
Ability to create, compose, and edit written materials
Thorough knowledge of grammar and strong writing ability
Strong attention to detail
Essential computer skills using Microsoft Office software and other digital mediums
Ability to use layout and design skills to design attractive communication tools such as newsletter, posters, and electronic slides
Ability to quickly foster goodwill while working with resident volunteers, committees and employees
Ability to promote and show enthusiasm for Lakeside Plantation activities
Assist with monitoring amenities and operating security programs including access controls
Cross train with Clubhouse Office Manager to assist residents however needed

EDUCATION AND EXPERIENCE:

An Associate's Degree in Business, General Studies, related field, or equivalent combination of education and experience required.

A minimum of two years' experience in lifestyle management, communication, marketing, or related business operations is required.

ESSENTIAL DUTIES:

Assist in daily operations of the Activities Office including processing incoming and outgoing mail, managing a multi-line phone system and interacting with customers
Assist in researching, developing, scheduling, promoting, implementing and facilitating activities programming and special events for residents and guests
Assist in maintaining a schedule of weekly activities, monthly activities, and special events for residents and guests
Assist in evaluating the effectiveness of activities and special events using research-gathering tools
Maintain accurate records of financial transactions for ticket and event sales
Assist in communication related to resident services

Assist residents who call or come to the office
Answer prospect and resident inquiries and concerns which may include questions about the surrounding area, the community, the company, amenities, etc.
Provide superior customer service to internal and external customers
Assist with maintaining internal media such as newsletter, electronic news messages, and community information meetings
Contribute to the maintenance of the District website
Provide layout and design services and support for monthly newsletter and other assigned publications, both print and electronic
Take photographs for print and electronic publications
Prepare files for electronic distribution
Work with staff and volunteers to propose and develop themes for Lakeside Plantation activities and event promotions
Assist in maintaining other activities communication media such as community information meetings
Assist in maintaining accurate records of financial transactions
Assist in daily operations of the Clubhouse Office including processing incoming and outgoing mail and forms, managing a multi-line phone system and interacting with customers
Assist in communication related to resident services
Assist residents who call or come to the office
Answer prospect and resident inquiries and concerns which may include questions about the surrounding area, the community, amenities, etc.
Provide superior customer service to internal and external customers
Perform other duties as assigned or as necessary

TYPICAL PHYSICAL DEMANDS:

Some bending, stooping and stretching. Occasionally lifting items weighing up to 30 lbs. Requires eye-hand coordination and manual dexterity sufficient to operate a keyboard, photocopier, telephone, calculator, and other office equipment. Requires normal range of hearing and eyesight to record, prepare, and communicate appropriate reports. Extensive data input and required ability to sit for long periods of time. This position requires an ability to stand during special events.

TYPICAL WORKING CONDITIONS:

Normal office environment open seven days a week. Employees must be able to physically access all exterior and interior parts of the community and amenities.
Flexible schedules with occasional evening and weekend work.

TITLE: Maintenance Worker

REPORTS TO: Community Director

JOB SUMMARY:

To maintain a safe, clean and attractive environment within the Clubhouse, tennis courts, amenities, parking lots, sidewalks, community entrance and all District common areas

KNOWLEDGE, SKILLS AND ABILITIES:

Ability to work in a physically demanding environment

Ability to read and follow instructions

Ability to work with little supervision

Ability to maintain a positive attitude when working with a team or independently

Ability to order and maintain an inventory of cleaning supplies and essential products

Ability to anticipate and execute activities and special event set-up based on scheduled events

Ability to be trained to operate tennis maintenance equipment

EDUCATION AND EXPERIENCE:

A high school education is desirable; experience with building maintenance and/or formal mechanical training is preferred

ESSENTIAL DUTIES:

Vacuum carpeted areas, dust furniture, dust baseboards, mop tiles areas, and clean windows/ledges in Clubhouse and restrooms, empty trash receptacles, cobweb exterior areas of amenities

Clean and sanitize toilets, toilet bases, counters, mirrors and other restroom fixtures. Stock restroom with supplies such as paper products and soap.

Ensure a safe, resident-friendly environment is maintained within all areas of the clubhouse and amenities

Follow a maintenance schedule including daily, weekly, monthly and annual maintenance duties

Ensure all rooms and amenities are cleaned, stocked, and maintained

Replace light bulbs and HVAC filters

Assist in maintaining a clean litter free atmosphere throughout the community

Communicate and troubleshoot with the Community Director

Be flexible with work schedule to set up for activities and special events as needed

Assist with maintenance of tennis courts

Track maintenance needs and progress of projects

Assist with street light audits

Pressure wash as assigned by Community Director

ADDITIONAL DUTIES:

Minor building repair and light carpentry as needed

Perform routine painting work

Other duties as assigned by clubhouse management

Report any areas of concern or damaged areas to immediate supervisor

Set up areas of clubhouse for special events and activities

Assist the Community Director with investigation of landscape or pond concerns

WORKING CONDITIONS:

The nature of this work may be physically demanding involving bending, cleaning, moving, and lifting to 50 pounds. Work must be completed on schedule. Much of the workday will be spent on foot. Ladders may be required to reach certain areas.

EDUCATION AND EXPERIENCE:

A high school education is desirable; experience with field management and/or landscaping, facility management, maintenance experience is preferred

WORKING CONDITIONS: The nature of this work may be physically demanding involving bending, cleaning, moving, and lifting to 50 pounds. Work must be completed on schedule. Much of the workday will be spent on foot. Some evening and weekend work may be required.



Rizzetta & Company

Lakeside Plantation Community Development District

Proposal for Amenity Management Services

Presented by: Rizzetta & Company, Inc.

**3434 Colwell Avenue, Suite 200
Tampa, Florida 33614
813.514.0400**

rizzetta.com

Professionals in Community Management

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Rizzetta & Company

About Rizzetta & Company

COMPANY INTRODUCTION:

Rizzetta & Company, Inc., is a Florida-based professional community management and consulting firm that provides services to residential and commercial communities throughout the state of Florida. With over 30 years in the industry, Rizzetta & Company, Inc., is staffed with highly experienced managers and support staff. Each of our eight offices throughout Florida has a team of employees with diverse backgrounds, both personally and professionally, who provide the highest quality services to our clients.

We provide professional expertise in five primary areas – District Services, Association Services, Community Services, Information Technology Services, and Real Estate Services to both Community Development Districts and Community Associations.

- **District Services:** As one of the largest Community Development District Management firms in the state of Florida, we provide professional management for over 100 Districts throughout the state of Florida.
- **Association Services:** We provide professional licensed portfolio and onsite management for over 180 Homeowners, Condominium and Commercial Property Owners Associations in Florida. That currently accounts for over 30,000 units in associations that will ultimately have near 40,000 total units at build out.
- **Community Services:** Community Services has two practice areas of expertise; Amenity Services and Field Services. These services are offered to Community Associations and Community Development Districts and can be customized to fit the needs of a community.
- **Information Technology Services:** Through our affiliate company, Rizzetta Technology Services, Inc., we provide professional information technology services for both Community Development Districts and Community Associations.
- **Real Estate Services:** Through our affiliate company, Rizzetta Management Services, Inc., we provide a full range of professional real estate services.



Rizzetta & Company

COMPANY HISTORY:

Rizzetta & Company, Inc., was founded and incorporated in 1986 in Tampa, Florida by William Rizzetta. The original focus of the company was to provide professional financial consulting services for Community Development Districts in association with issuance of municipal bonds.

As the company's reputation for excellent work and customer service grew, the practice expanded over the next thirty years by adding related services which resulted in today's "Full Service" organization. Below is a timeline of our growth through our first thirty years:

- **1986** – Rizzetta & Company, Inc. was founded.
- **1992** – Collection agent services were added for Community Development Districts to support the process of bond repayments.
- **1996** – Community Development District Management services were added.
- **1998** – As a natural counterpart to District Management, Association Management was introduced.
- **2008** – Seeing a growing need for amenity services at the request of various clients, our Amenity Management Services division was created.
- **2009** – In addition to the growing Amenity Management Services, the need for more landscape oversight led to adding our Field Services.
- **2011** – With the departure of various companies from the marketplace, Continuing Disclosure services were added to provide various compliance reporting for Districts and Bondholders.
- **2013** – Due to the recession, some Districts were in financial crisis and required the formation of Special Purpose Entities to manage them through these times. Our firm was asked to take on many of these projects as an additional service.
- **2015** – With the continued growth in technology and changes to Florida Laws, we formed a second affiliate company, Rizzetta Technology Services, Inc., to provide website development and hosting, along with email and support services to our clients.
- **2016** – Rizzetta & Company, Inc. celebrated its 30th anniversary and continued growth with the opening of two new office locations in Citrus Park and Riverview.

For more information, please visit our company website at www.rizzetta.com.



Rizzetta & Company

OFFICE LOCATIONS:

CORPORATE (14 Team Members)

3434 Colwell Avenue
Suite 200
Tampa, Florida 33614
Phone: (813) 514-0400
Fax: (813) 514-0401

PANAMA CITY BEACH (2 Team Members)

120 Richard Jackson Boulevard
Suite 220
Panama City Beach, Florida 32407
Phone: (850) 334-9055
Fax: (850) 334-9062

CITRUS PARK (22 Team Members)

12750 Citrus Park Lane
Suite 115
Tampa, Florida 33625
Phone: (813) 933-5571
Fax: (813) 935-6212

RIVERVIEW (29 Team Members)

9428 Camden Field Parkway
Riverview, Florida 33578
Phone: (813) 533-2950
Fax: (813) 935-2922

FORT MYERS (4 Team Members)

9530 Marketplace Road
Suite 206
Fort Myers, Florida 33912
Phone: (239) 936-0913
Fax: (239) 936-1815

ST. AUGUSTINE (13 Team Members)

2806 North Fifth Street
Unit 403
St. Augustine, Florida 32084
Phone: (904) 436-6270
Fax: (904) 436-6277

ORLANDO (15 Team Members)

8529 South Park Circle
Suite 330
Orlando, Florida 32819
Phone: (407) 427-2471
Fax: (407) 472-2478

WESLEY CHAPEL (27 Team Members)

5844 Old Pasco Road
Suite 100
Wesley Chapel, Florida 33544
Phone: (813) 994-1001
Fax: (813) 994-2100



Rizzetta & Company

Our Commitment to Industry and Community

Being a leader in District Management means always being aware of industry related developments and sharing that knowledge with our peers. We support and encourage the continuing education of all staff by providing the resources needed for staff to attend classes and conferences. Rizzetta & Company holds memberships in the following professional organizations:

- **Association of Florida Community Developers (AFCD):** AFCD's mission is to provide a leadership role in the creation of quality community development and the formulation of a responsible approach to the planning and development of Florida's future.
- **CFO Exchange Group (CFOx):** CFO Exchange Group (CFOx) is a protected, thought leadership, member-driven intelligence organization for top finance executives of Florida's small to mid-sized companies. CFOx empowers Florida's leading finance executives by providing a secure environment to cultivate relationships and interact with peers in the exchange of ideas, best practices, and experiences, and serve as a sounding board for technical and business matters.
- **Community Associations Institute (CAI):** CAI provides education, tools and resources to people who govern and manage homeowner's associations, condominiums, and other planned communities. All of Rizzetta & Company's Community Association Managers are members of CAI. In addition, Rizzetta & Company is a Chapter Sponsor of the Community Associations Institute.
- **Florida Association of Special District (FASD):** The mission of the Florida Association of Special Districts is to unify and strengthen special purpose government through education, the exchange of ideas and active involvement in the legislative process.
- **Florida Government Finance Officers Association (FGFOA):** The FGFOA was founded in 1937 and serves more than 2,700 professionals from state, county, and city governments, special districts and private firms. The FGFOA is a professional resource that provides opportunities through education, networking, leadership and information.
- **Florida Nursery, Growers and Landscape Association (FNGLA):** The association represents all walks of the industry--foliage, woody ornamental, citrus nurseries, floriculture producers, interiorscapers, retailers, allied suppliers, and landscape professionals. Landscape contractors, landscape designers, landscape architects and the like now have an association targeting their needs. Government representation & monitoring, professional education and marketing projects encompass just some of the services provided by FNGLA to members and the industry.



Rizzetta & Company

- **International Society of Arboriculture (ISA):** Through research, technology, and education, the International Society of Arboriculture promotes the professional practice of arboriculture and fosters a greater worldwide awareness of the benefits of trees.
- **Leadership Tampa Bay:** Leadership Tampa Bay is a non-profit organization that is governed by an independent board of directors who live and work in various parts of the Tampa Bay region. As a non-partisan, non-special interest forum for regional progress, Leadership Tampa Bay enhances awareness, education and knowledge of major regional issues through learning experiences and discussion.
- **Pasco Alliance of Community Associations (PACA):** PACA was created in April 2007 to help Community Development Districts (CDDs), Homeowner Associations (HOAs), and Condominium Associations (CAs) with internal and external problems by having a synergistic effect.
- **Tampa Bay Builders Association (TBBA):** The TBBA is a trade organization, which works diligently to fulfill its mission by providing important services to enhance the building industry in Pasco, Pinellas, and Hillsborough Counties. It is affiliated with the Florida Home Builders Association and the National Association of Home Builders and dates to 1946.
- **The Northeast Florida Builders Association (NEFBA):** At NEFBA, we are proud to hold the status of the state's largest builders association. Backed by our 70-year-history of networking, community outreach and industry development, NEFBA's primary goal is to improve the quality of life for the citizens of Northeast Florida.
- **The Greater Tampa Chamber of Commerce:** The mission of the Greater Tampa Chamber of Commerce is to serve members and enhance the community by building business success. The chamber offers educational and networking opportunities, leadership development programs and government advocacy to protect and advance the interest of Tampa's business community.
- **Urban Land Institute, Tampa Bay (ULI):** The mission of the Urban Land Institute is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide.
- **Visit Tampa Bay:** The mission of Visit Tampa Bay is to create vibrant economic development for our community by collaboratively increasing visitation to Tampa Bay.



Our People

Rizzetta & Company prides itself on the experience and dedication of its collective staff. When you engage Rizzetta, you have a combined group with hundreds of years of experience at your service. Each team member is carefully selected, subject to criminal background check which scan local, county, state and federal databases for their present and previous residences spanning the prior 7 years. Sex offender, fraud and abuse registries are then searched, and verifications made that there are no current wants or warrants for the individual. Civil records are searched and with prior employment rigorously verified. Lastly, all Rizzetta personnel are required to pass a 5-panel drug screening prior to being offered a position with us.

Bill Rizzetta is the founder and President of Rizzetta & Company and has been responsible for the overall operation of the firm for over 30 years. In that time, he participated in the establishment and management of over 150 Community Developments Districts in Florida which issued over \$3 Billion in bonds in over 250 separate transactions and managed over 170 Homeowners Associations.

He received his Bachelor's Degree from the U.S.F. College of Engineering and his M.B.A. From U.S.F. School of Business. He has been qualified as an expert witness and provided testimony in bond validation hearings in circuit court; administrative hearings conducted by the State of Florida, local public hearings required for establishment of CDD's and the levy of special assessments and litigation regarding impact fee assessments.

He built Rizzetta on emphasizing the importance of giving back to the community and financially supports a variety of organizations including The Spring, Joshua House, Meals on Wheels, Athletes & Causes, Tampa Bay Heroes, and the Shriners. He previously served on the Board of Directors of the Tampa Lighthouse for the Blind and currently serves on the Board of Directors of the Jason Ackerman Foundation.

Bob Schleifer is the Chief Operating Officer tasked with overseeing all operational areas of the Rizzetta companies including District Services, Association Services, Field and Amenity Services, Information Technology, Human Resources and Marketing. Over his 30+ years in business he has gained broad experience in real estate (management, acquisition, site selection and tenant prep), information technology (software and database development, administration, procurement, and infrastructure design), manufacturing engineering, electrical (hardware) design, statistical analysis, logistics, law enforcement, market research and political consulting.

Bob received his B. S. in Electrical Engineering from the University of Minnesota Institute of Technology and his M.B.A. from U.S.F. School of Business with a concentration in Information Systems. Bob is a veteran of the United States Army Military Police Corps.



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Heather Russel is our Vice President of Operations where she is responsible for contract management and compliance, staffing, customer service, business development and corporate association matters. Prior to her current position, Heather served for 17 years as the Director of Community Association Management, overseeing a team of management and support personnel.

Prior to joining Rizzetta Heather held positions as a portfolio Community Association Manager, an on-site manager and a Florida licensed real estate associate. She is a designated Association Management Specialist (AMS), Certified Manager of Community Associations (CMCA), is a Florida Licensed Community Association Manager (LCAM), and a Florida Notary Public.

Scott Brizendine is the Vice President of Operations after beginning his employment with Rizzetta in 2005. While starting as District Manager he has evolved to overseeing the writing of assessment methodology reports for bond issuances, refunding's and restructures; authoring Statement of Estimated Regulatory Costs reports for establishment and amendment petitions; oversight of assessment roll processing and compliance responsibilities as Dissemination Agent and Disclosure Representative.

Prior to joining Rizzetta Scott worked in the Finance Department of the Walt Disney Corporation providing services in cash management, account reconciliation and financial reporting. He holds a bachelor's degree in Finance from Florida State University and is a licensed Community Association Manager and a Notary Public and graduate of the Leadership Tampa Bay Class of 2018.

Matt Huber has worked for Rizzetta for 14 years and is the Regional District Manager overseeing the West Coast of Florida and the associated offices in Riverview, Citrus Park and Wesley Chapel. In this capacity and his prior role of District Manager, Matt has overseen a portfolio of Community Development Districts in Pasco, Hillsborough, and Manatee Counties.

Prior to joining Rizzetta Matt worked as a Land Development Manager with DR Horton in the Fort Myers area and had interned with the Board of County Commissioners Long Range Planning Department in Polk County and has served on numerous community boards and volunteers for various activities throughout the community. Matt is a veteran Combat Engineer of the United States Marine Corps.

Kaitlyn Gallant is the Manager of District Accounting Services for Rizzetta. She started Rizzetta in 2006 as a Construction Accounting Clerk and has progressed to her current role where is responsible for all facets of district accounting, including preparation of financial statements, processing accounts payable and construction requisitions, reconciliation of bank statements, recording and collecting assessments, completing annual audits, and all other accounting processes that periodically require attention.

Kaitlyn received her bachelor's degree in International Business and Economics from Fitchburg State University in Massachusetts. As part of her coursework, she studied abroad in London, England.



Rizzetta & Company

About Our Amenity Management Services

Our Amenity Management offers an extensive menu of amenity management services for both Community Development Districts and Community Associations.

Our amenity management services are customized and cost effective to meet our client's needs. We offer creative and diverse programs which include numerous activities for both children and adults. We currently manage over twenty-five amenity facilities throughout Florida. The Amenity Services division was created in 2008.

Please see our complete listing of amenity management services below:



Pre-Opening Services



Onsite Management Services



Recreation Management Services



Lifestyle Programming and Activities



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References



Aaron J Baker, VP Operations

Bexley Homeowners Association, Inc.

Land O' Lakes, Florida

Email: abaker@newlandco.com

Bill Boutin Jr., Chairman

The Groves Community Development District

Land O' Lakes, Florida

Email: wboutin1@tampabay.rr.com



Brian Sailer, Chairman

Preserve at Wilderness Lake Community

Development District – Land O Lakes, Florida

Email: supervisorwlp5@gmail.com



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Corporate Management Team

Lucianno Mastrionni Director, Community Services for Rizzetta & Company, Inc. Lucianno oversees the Amenity Services and Field Management Services Divisions overseeing functions, focusing on planning, development, and delivery of all programs, maintenance, and operation of facilities.

Before joining our team, Lucianno served in hotel general management and asset management for hotel ownership companies including Hilton, Marriott, and IHG hotels, and worked in guest service operations management for The Walt Disney Company for over a decade. Most recently Lucianno served in corporate Hotel Management and Task Force General Management oversight, recovering distressed properties for an array of major hotel ownership companies across the United States.

Mr. Mastrionni can be reached at 813.933.5571 and lmastrionni@rizzetta.com

Gregg Gruhl Manager, Amenity Services for Rizzetta & Company, Inc. Gregg oversees and supports the onsite facility management staff. Gregg has worked for Rizzetta & Company, Inc. for 10 years. 5 years as a Clubhouse Manager and now as Amenity Services Manager.

Prior to joining Rizzetta & Company, Inc Mr. Gruhl served as the Region 3 Tennis Program Coordinator for USTA Florida as well as being the Tournament Director for multiple USTA Pro Circuit tournaments. He served 22 years as the Director of Tennis at Northdale Golf and Tennis Club. He also coached tennis at the University of Tampa and the University of South Florida. After, he moved on to be the Athletic Director at Harbour Island Athletic Club. Mr. Gruhl received his Bachelor of Arts from the University of South Florida.

Mr. Gruhl can be reached at 813.933.5571 and ggruhl@rizzetta.com

Deneen Klenke Manager of Amenity Services for Rizzetta & Company, Inc. Deneen oversees and supports the onsite facility management staff. Deneen has 9+ years of Clubhouse management experience and has worked for Rizzetta & Company, Inc. as a Clubhouse and Amenities Manager for six of those years. Deneen received her Bachelor of Arts degree in Business Administration from Lenoir-Rhyne College in Hickory, NC.

Ms. Klenke can be reached at 813.933.5571 and dklenke@rizzetta.com



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Scope of Services

INTRODUCTION:

Rizzetta & Company, Inc. ("Consultant"), at the request of the Lakeside Plantation Community_Development District ("District") is providing a proposal for professional Amenity Management Services. These services are listed by the following categories:

- MANAGEMENT
- PERSONNEL
- RESPONSIBILITIES
- ADDITIONAL SERVICES
- LITIGATION SUPPORT SERVICES

A detailed description of these services is provided below:

MANAGEMENT:

Rizzetta & Company, Inc. shall provide expert general management and oversight of the contract with the District and within the agreed to scope of service. These responsibilities include duties associated with managing the personnel, such as recruiting, hiring, training, oversight, and evaluation.

STANDARD ON-GOING SERVICES: These services will be provided on a recurring basis and are commonly referred to as the basic services necessary for the normal and routine functioning of the District.

REQUIREMENTS AND PROCEDURES:

1.1 Operation Procedures

Rizzetta & Company, Inc. shall perform the basic services outlined within the Scope of Services at the hours and days requested by the Owner.

1.2 Key Personnel

All Work shall be managed and/or directed by key personnel identified in the proposal. Where applicable, Rizzetta & Company, Inc. shall require certifications, training, etc. be secured and updated for all employees. Rizzetta & Company, Inc shall provide one (1) Community Director/Amenity Manager who is knowledgeable of Rizzetta & Company, Inc. daily activities when performed at the site. This Director shall serve as the point of contact between the Owner and Rizzetta & Company, Inc. The Director shall be responsible for coordinating all scheduled services with the Owner. The Director shall be responsible for overseeing all amenity management administrative, maintenance, and recreational personnel, security attendants, landscape and pond maintenance contracts. Should a problem arise, the Community Director shall present the problem to the Owner for direction.



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1.2.1 Rizzetta & Company Inc. shall provide staff for the following responsibilities:

Community Director/Amenity Manager, Office Management Staff, Lifestyle & Communications Staff, Tennis Personnel, and Maintenance Personnel.

1.2.2 The following duties are required of Rizzetta & Company, Inc.:

Tactfully communicate with residents regarding issues.

Investigate and resolve complaints and concerns from residents.

Understand and ensure compliance with federal, state and local legislation relevant to Community Development District and planned communities.

Assume responsibility for operations and maintenance of all amenities including, but not limited to community pool and spa, playground, fitness center, bocce court, tennis courts, pickleball/basketball court, billiard room, library and clubhouse.

Assume responsibility for operations and maintenance of all common areas, sidewalks, fountains, parking areas, and storage areas.

Assume responsibility for management of the security contract for common areas, parking areas, storage areas, amenities and clubhouse.

All aspects of the product and supply ordering process in order to maintain all supplies at a proper level.

Attend and speak at new resident orientation meetings or other community information meetings.

Facilitate staff meetings to discuss upcoming events, District policies, personnel development, and pertinent issues.

Maintain contact with the Owner on an as needed basis.

Coordinate all scheduled services with the Owner.

Oversee the janitorial and maintenance of clubhouse and amenities.

Coordinate with District Management to manage the landscape and pond maintenance contracts.

Implement and maintain a safety program for the staff and residents.

Deliver by mail or electronic mail all records to Owner.



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Gather feedback from residents and guests and create improvement plans based on feedback.

Ensure accurate records (such as incident reports, accident reports, maintenance records) are maintained for insurance purposes.

Oversee, manage, train and develop amenity management, recreational, and maintenance/janitorial personnel.

Oversee all aspects of room rental process, including scheduling and planning, working with clients, drafting contracts, collecting fees, and gathering feedback from events.

Oversee all aspects of tennis membership program including gathering fees, maintaining records, court scheduling, and promoting compliance with tennis policies.

Work closely with resident organizations and volunteers for the planning and executing of social events.

Interview and hire for certain recreational vendors or programs.

Coordinate with District Management to process all accounts payable and accounts receivable associated with District services.

Layout, design and maintain tickets, seating charts and other activities materials.

Maintain promotional flyers and registrations at Club Office.

Facilitate electronic news messages and electronic newsletters.

Continuously monitor the facilities and amenities. Document and report incidents to the Owner.

Maintain an online resident directory.

Promote voluntary compliance with District policies. Facilitate progressive discipline for those who fail to abide by District policies.

Owner reserves the right to adjust these requirements as needed.

1.3 Personnel Dress Code:

Rizzetta & Company, Inc. shall ensure that employees working on site shall always wear uniforms or professional attire. Clothing that expresses or implies obscene language or graphics, degrading or demeaning connotations, or in the opinion of the Owner is unsightly for any reason, shall be strictly prohibited. Rizzetta & Company, Inc. personnel shall always wear proper attire and shall wear footwear that conforms to safe work practices.



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1.4 Personnel Conduct:

Rizzetta & Company, Inc. shall enforce strict discipline and good order among its employees on the project site. Rizzetta & Company, Inc. shall ensure that its employees communicate and interact with the Lakeside Plantation community and any other customer/party associated with the Lakeside Plantation project are knowledgeable of the project and the services Rizzetta & Company, Inc. is performing.

1.5 Safety Program:

Rizzetta & Company, Inc. shall develop, implement, and maintain a safety program for its operations on the Project. That safety program shall include, at a minimum, a safety policy, safety rules, safety training, safety evaluations, safety operations, and procedures for accident investigations, providing and maintaining equipment safety features, and safety record keeping. It is mandatory all employees have adequate safety knowledge and demonstrate ability to abide by and promote the safety program. Once an employee has completed safety training, Rizzetta & Company, Inc. should provide training certificates for each employee.

1.6 Facility Location:

The Owner shall only provide office space on the project site for Rizzetta & Company, Inc. as part of this Scope of Services.

1.7 Document Control and Data Maintenance:

Administrator's Records:

Rizzetta & Company, Inc. shall keep accurate records of all incidences that occur while on duty, documents received, and if applicable, issued by Rizzetta & Company, Inc. Rizzetta & Company, Inc. shall keep records of important passwords, vendor directory, maintenance checklists and other documentation important to the day-to-day operation of the District.

1.8 Liability Insurance:

Rizzetta & Company, Inc. shall, throughout the performance of its Services pursuant to this Agreement, maintain: Occurrence basis comprehensive general liability insurance (including a broad form contractual coverage) with minimum limits of \$2,000,000.00 respectively, protecting it and Owner from claims for bodily injury (including death) and property damage which may arise from or in connection with the performance of Rizzetta & Company, Inc. services from or out of any act or omission of Rizzetta & Company, Inc., its officers, directors, agents, and employees.

COORDINATION:

Rizzetta & Company, Inc. shall provide coordination with the Owner for all items associated with the requirements of this Agreement.



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General Coordination:

Rizzetta & Company, Inc. shall meet with the Owner on a regular basis. The schedule will be determined by the Owner but will likely be monthly. Those meetings shall serve as a forum for the exchange of information, identification of pertinent and critical issues, determination of an action plan and schedule for resolving those issues, review of schedule, and budget status. Rizzetta & Company, Inc. shall prepare the agenda for those meetings and submit it to the Owner two (2) working days prior to the date of each meeting. The Owner shall provide the meeting location which may be a virtual meeting format.

In addition, Rizzetta & Company, Inc. shall provide a representative to attend the community meeting of the Lakeside Plantation Board of Supervisors. This representative shall be knowledgeable of this Project Scope and Scope of Services and shall be able to respond to any questions the Board may have as to the day-to-day activities at the project site pursuant to this Agreement; moreover, prepare status reports for the Board per the timeline provided by the District Manager's office.

Community Director:

The Rizzetta & Company, Inc. Community Director shall will be responsible for overall supervision of the Rizzetta & Company, Inc. work force on the project and shall act as the single point of contact, on an as needed basis, between the Owner and Rizzetta & Company, Inc.. This individual shall be responsible for overseeing all aspects of amenity management. The Community Director will supervise and facilitate vibrant resident lifestyle opportunities including an array of social, educational, recreational and wellness activities. High quality and timely communication with residents using electronic newsletter, electronic messaging, online resident directory and community meetings will be supervised by the Community Director. Maintaining a clean and safe environment and promoting compliance with District policies are of utmost importance. The Community Director is to ensure all staff and vendor efforts align with these goals.

SCHEDULED OPERATIONS:

Activities:

Rizzetta & Company, Inc. shall provide social, wellness, and entertainment activities on a weekly and monthly basis. Rizzetta & Company, Inc. will be responsible for the research, production, scheduling, organization, promotion, and monitoring of a broad range of activities for the residents of the Lakeside Plantation community. At the end of each activity, Rizzetta & Company, Inc. should gather feedback from participants. Rizzetta & Company, Inc. shall evaluate the effectiveness of each activity, compile, and implement improvement plans for future activities.

Rizzetta & Company, Inc. shall develop and design promotional flyers, seating charts and other materials for specific activities. The Clubhouse Office will provide information, registration of activities and attend to the needs of residents.



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The Clubhouse Office staff should answer telephone calls, process incoming and outgoing mail and electronic mail for the community. A schedule of activities must be kept current for Lakeside Plantation and posted in proper locations within the community. There will be a monthly electronic calendar for the residents and included within the monthly electronic newsletter. Activity rooms will be scheduled, designed and setup prior to each activity. Staff should facilitate community meetings to present upcoming activities and community news. Staff should gather suggestions from residents for future activities and community improvements on a regular basis. Knowledge of the audio/video equipment is required; furthermore, training volunteers and staff to properly use the equipment is required.

Events:

Rizzetta & Company, Inc. shall develop, schedule, promote, plan and facilitate all events for Lakeside Plantation. Events will include banquets, socials, parties, holiday activities, receptions, and other special events. At the end of each event, Rizzetta & Company, Inc. should gather feedback and evaluate success of each event, staff and other resources; furthermore, compile, and implement improvement plans for future events. Rizzetta & Company, Inc. shall develop and design promotional flyers, seating charts and other materials for special events. Rizzetta & Company, Inc. will be responsible for ensuring that the Clubhouse and all amenities is secure and locked down on a nightly basis.

Clubhouse Availability:

Rizzetta & Company, Inc. will ensure that the Clubhouse will be open for residents and guests seven (7) days per week throughout the year, notwithstanding emergency situations. The Clubhouse Office will be closed on holidays including New Year's Day, Memorial Day, 4th of July, Labor Day, Thanksgiving and Christmas.

Online Resident Directory & District Website:

The Lakeside Plantation online resident directory is the responsibility of the Rizzetta & Company, Inc. Rizzetta & Company, Inc. will supervise and maintain the content and technical aspects of the resident directory. Rizzetta & Company, Inc. will assist with monitoring and updating the District website.

Monthly Electronic Newsletter and Electronic Message Blasts:

The Lakeside Plantation electronic monthly newsletter is the responsibility of Rizzetta & Company, Inc. Rizzetta & Company, Inc. will supervise, design, edit, publish, and maintain the content of the electronic newsletter. At all times the newsletter content should contain community amenity news, recreational programming information, community information, special events, and activities. In addition, Rizzetta & Company, Inc. is expected to maintain all the technical aspects of the newsletter while implementing new material, graphics and updating content. Rizzetta & Company, Inc. must maintain a current mailing list of resident subscribers. A representative from the newsletter should attend community meetings, present ideas, share articles and attain information to be included in the newsletter. Electronic mail messages promoting activities, alerting residents to important maintenance news or other information that impacts residents at Lakeside Plantation will be sent as often as needed. All resident communications are expected to be free from grammar and spelling



errors.
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Community Meetings:

Rizzetta & Company, Inc. will schedule community information meetings. The purpose of these meetings is to highlight and outline the activities provided by Lakeside Plantation Community Development District for the Lakeside Plantation residents. These meetings can also serve as an orientation time for new residents to the community. The Rizzetta & Company, Inc. staff will present activities and information about Lakeside Plantation, community events, and provide thorough and logical answers to resident questions. Representatives, when possible, should be available to present new programs within the community for residents to participate.

ADMINISTRATION/OPERATIONS:

The Administration and Operations program shall be kept up-to-date at all times by the Rizzetta & Company, Inc.. Revisions to the document shall be indicated by footnote on the revised pages. Revisions shall be distributed by Rizzetta & Company, Inc.. to all document holders.

Rizzetta & Company, Inc.. shall prepare draft copies of the document for review and comment by the Owner within ten (10) calendar days of the notice to proceed with the Services.

Administration:

3.1.1 The administrative section of the document shall, at a minimum, address those functions, which are the responsibility of Rizzetta & Company, Inc. related to all administrative matters generally described in the Scope of Services and as outlined below. Organizational charts for administrative management functions include key personnel names, job titles, electronic mail addresses, and phone numbers.

Policies and procedures related to the Rizzetta & Company, Inc. program for communications with the Lakeside Plantation community relative to operations and customer service.

Personnel policies and procedures related to Rizzetta & Company, Inc. personnel performing services on the Lakeside Plantation site.

Maintenance Checklists including daily, weekly, monthly and annual maintenance requirements at Lakeside Plantation.

Hurricane and Severe Weather Preparedness Plan for community readiness.

Emergency Preparedness Plan to address natural or other disasters.

Vendor Directory including all necessary contact information for vendors providing supplies or services to the District.



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Basis for Compensation and Payment:

Rizzetta & Company, Inc. shall be compensated for rendered services set forth herein at such time the Lakeside Plantation Community Development District receives revenues from the Sarasota County Tax Collector's Department. Notwithstanding the above, it is anticipated that the Owner and Rizzetta & Company, Inc. would enter into a lump sum contract whereby the Contractor would be paid in monthly installments.

RESPONSE TIME:

Rizzetta & Company, Inc. shall provide services or a response to the request for service within twenty-four (24) hours of receipt. The following is general response time information and requirements for the Emergency Response Program to be developed, implemented, and maintained by Rizzetta & Company, Inc.

General:

Rizzetta & Company, Inc. shall, on a timely and efficient basis, respond to any and all requests, and inspections, and observations, etc. stipulated in the Project Manual. Rizzetta & Company, Inc. shall provide supervisory and operating personnel as required who shall be available on call 24 hours per day, 7 days per week to respond to and correct any problems with any of the elements covered by this Agreement. Should Rizzetta & Company, Inc. fail to respond to a request for any services addressed in this Project Scope within the required allotted time, the Owner should, at Rizzetta & Company, Inc. sole expense, provide the requested services.



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PERSONNEL: As the appointed Amenity Management agency we shall provide the services of Clubhouse personnel that will be assigned to the District. A general description of these positions is provided below:

1. Community Director/Amenity Manager:

ESSENTIAL DUTIES:

Maintain excellent level of resident service and satisfaction.
Foster goodwill with residents, board members, contracted personnel, staff, volunteers and the business community by maintaining positive communications.
Oversee property and amenity maintenance including, but not limited to community pool and spa, playground, fitness center, bocce court, library, pickleball/basketball facilities, playground, clubhouse, parking areas, storage areas, landscaping, roads, storm water system, lakes, retentions ponds, sidewalks and common areas.
Recruit, hire, train, coach, manage and evaluate necessary employees.
Investigate and comply with relevant federal, state, and local legislation.
Communicate essential information to District Manager and/or Board of Supervisors; advise on recommended policy changes and community improvements.
Work with District Manager as well as the Board of Supervisors to integrate new policies into operations; routinely review operations and procedures for efficacy.
Consult with staff and others in government and private organizations to discuss issues, coordinate activities and resolve problems; serve as a liaison to other local governments and public agencies during the day, evening or weekend.
Oversee research and implementation of activities programming for residents and guests.
Oversee development, scheduling, marketing, promoting, and facilitating special events.
Communicate by writing, editing, and publishing print and electronic media including monthly newsletters, promotional materials and communication with residents.
Oversee maintenance and development of digital resident directory.
Oversee maintenance of scheduled resident and rental activities.
Evaluate the effectiveness of onsite management using research gathering tools.
Facilitate information meetings with residents using public speaking skills.
Coach resident members to assume leadership roles; oversee volunteer management.
Coordinate with District Management to manage various vendor contracts.
Coordinate with District Management to Manage All Aspects of Special Maintenance or Capital Projects.
Attend and present information at board meetings as needed.
Communicate and train during staff meetings to ensure current efforts are aligned with Board goals and policies.
Review, approve and present reports, studies and research relating to operational effectiveness.
Administer, interpret and explain policies, rules, regulations and laws.
Oversee continuous monitoring of clubhouse and amenities for safety, compliance with amenity policies and resident satisfaction.
Landscape and pond inspections (weekly or more often if needed).
Review and approve accounts payable and receivable
Coordinate with District Management to Facilitate Landscape and Pond Maintenance Reports for Board of Supervisors Meetings.



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Safeguard District amenities and facilities.
Oversee Amenity Access and Security Control.

2. Club Office Manager:

ESSENTIAL DUTIES:

Answer and manage incoming telephone calls.
Receive, sort and process incoming mail and shipments.
Assist residents with copying, faxing and scanning documents.
Keep records of repairs, contractor visits and other facility maintenance.
Maintain a database of facility maintenance vendors.
Maintain digital resident directory and resident records.
Provide facility rental information to inquiries.
Keep records of upcoming room reservations/equipment rentals and collect room rental fees, security deposits and necessary forms.
Keep record of tennis membership, collect tennis fees and necessary forms.
Keep records of accounts payable information such as packing lists and contractor visits.
Keep records of incoming revenue and prepare deposits and related reports.
Communicate with residents by contributing to monthly newsletter and other internal media.
Maintain inventory of office supplies, clubhouse supplies and kitchen supplies.
Assist the Community Director with purchasing operating supplies and equipment.
Assist the Community Director with evaluating the effectiveness of resident services using research gathering tools.
Implement new office procedures as needed.
Review and analyze office expenses and supply purchases for cost savings measures and assist with budgeting and invoicing.
Maintain employee time off requests, payroll records and support logistics efforts for staff meetings.
Orchestrate appointments, meetings, schedules, and contacts for Community Director
Assist the Community Director with investigating complaints, disturbances and violations and resolving the issues.
Handle confidential information via electronic and hardcopy correspondence discreetly.
Assist with monitoring amenities and operating security programs including access controls.
Cross train with Lifestyle Staff to assist residents however needed.

3. Lifestyle & Communications Manager:

ESSENTIAL DUTIES:

Assist in daily operations of the Activities Office including processing incoming and outgoing mail, managing a multi-line phone system, and interacting with customers.
Assist in researching, developing, scheduling, promoting, implementing, and facilitating activities programming and special events for residents and guests.
Assist in maintaining a schedule of weekly activities, monthly activities, and special events for residents and guests.



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Assist in evaluating the effectiveness of activities and special events using research-gathering tools.
Maintain accurate records of financial transactions for ticket and event sales.
Assist in communication related to resident services.
Assist residents who call or come to the office.
Answer prospect and resident inquiries and concerns which may include questions about the surrounding area, the community, the company, amenities, etc.
Provide superior customer service to internal and external customers.
Assist with maintaining internal media such as newsletter, electronic news messages, and community information meetings.
Contribute to the maintenance of the District website.
Provide layout and design services and support for monthly newsletter and other assigned publications, both print and electronic.
Take photographs for print and electronic publications.
Prepare files for electronic distribution.
Work with staff and volunteers to propose and develop themes for Lakeside Plantation activities and event promotions.
Assist in maintaining other activities communication media such as community information meetings.
Assist in maintaining accurate records of financial transactions.
Assist in daily operations of the Clubhouse Office including processing incoming and outgoing mail and forms, managing a multi-line phone system and interacting with customers.
Assist in communication related to resident services.
Assist residents who call or come to the office.
Answer prospect and resident inquiries and concerns which may include questions about the surrounding area, the community, amenities, etc.
Provide superior customer service to internal and external customers.
Perform other duties as assigned or as necessary.

4. Maintenance:

ESSENTIAL DUTIES:

Vacuum carpeted areas, dust furniture, dust baseboards, mop tiles areas, and clean windows/ledges in Clubhouse and restrooms, empty trash receptacles, cobweb exterior areas of amenities.
Clean and sanitize toilets, toilet bases, counters, mirrors and other restroom fixtures.
Stock restroom with supplies such as paper products and soap.
Ensure a safe, resident-friendly environment is maintained within all areas of the clubhouse and amenities.
Follow a maintenance schedule including daily, weekly, monthly and annual maintenance duties.
Ensure all rooms and amenities are cleaned, stocked, and maintained.
Replace light bulbs and HVAC filters.
Assist in maintaining a clean litter free atmosphere throughout the community.
Communicate and troubleshoot with the Community Director.



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Be flexible with work schedule to set up for activities and special events as needed.
Assist with maintenance of tennis courts.
Track maintenance needs and progress of projects.
Assist with street light audits.
Pressure washing as assigned by Community Director.

5. USPTA Tennis Pro/Maintenance:

ESSENTIAL DUTIES:

Have required certifications.
Coordinate tennis and league activity.
Plan and implement lesson program.
Maintain a high standard of clay court quality and playability.
Other duties as assigned by Manager.

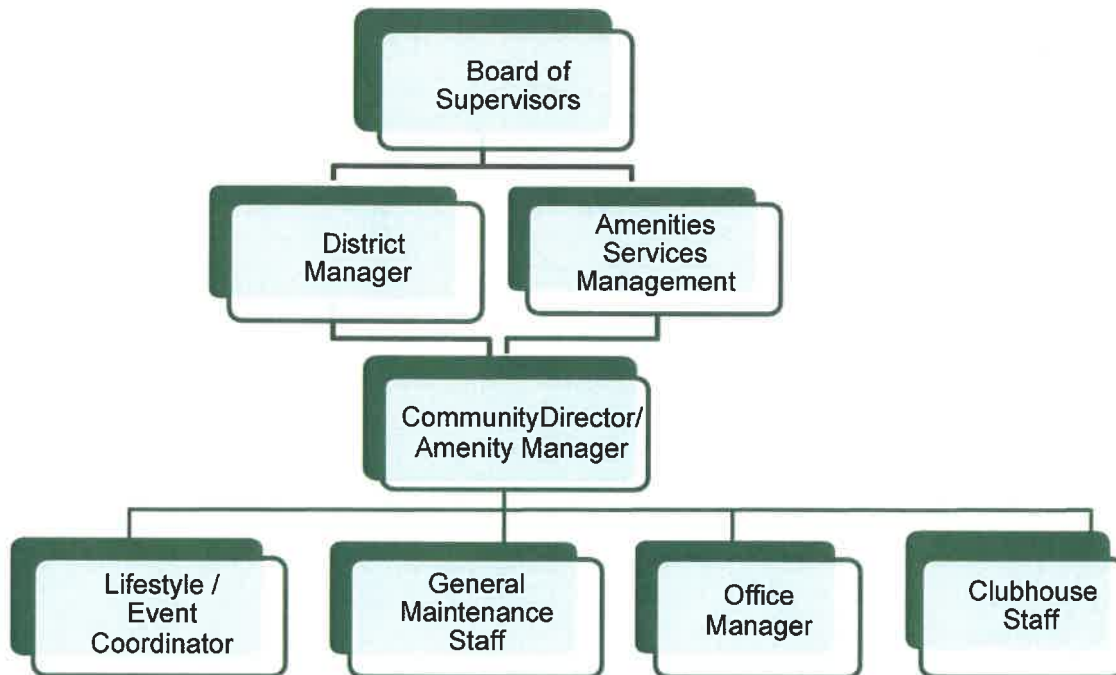
LITIGATION SUPPORT SERVICES: Prepare documentation in response to litigation requests and provide necessary expert testimony in connection with litigation involving District issues.

If any litigation support services are required or requested, the Consultant will provide a detailed description of these services and fees for such services to the District for approval prior to beginning any additional services.



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Organization Chart



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Schedule of Fees

AMENITY MANAGEMENT SERVICES:

Services will be billed bi-weekly, payable in advance of each bi-week pursuant to the following schedule for the period of **October 1, 2021, to September 30, 2022.**

PERSONNEL: (12 MONTHS)

Community Director/Amenity Manager:

Full Time Personnel - 40 hr/wk

Lifestyle/Event Coordinator:

Full Time Personnel - 40 hr/wk

General Maintenance:

Full Time Personnel - 40 hr/wk

Office Manager:

Full Time Personnel - 40 hr/wk

Clubhouse Staff:

Part Time Personnel - 40 hr/wk

ANNUAL

Budgeted Personnel Total ⁽¹⁾	\$ 255,938.00

General Management and Oversight ⁽²⁾	\$ 15,400.00

Total Services Cost:	\$ 271,338.00

One-time Payroll Deposit ⁽³⁾	\$ 19,894.00



Rizzetta & Company

(1). Budgeted Personnel: These budgeted costs reflect full personnel levels required to perform the services outlined in this contract. Personnel costs includes: All direct costs related to the personnel for wages, Full-Time benefits, applicable payroll-related taxes, workers' compensation, and payroll administration and processing.

(2). General Management and Oversight: The costs associated with Rizzetta Amenity Services, Inc.'s expertise and time in the implementation of the day-to-day scope of services, management oversight, hiring, and training of staff.

(3). Payroll Deposit: A one-time deposit required for use in paying salaries and related costs for personnel assigned and providing services to the District. This payroll deposit is defined as one month of maximum total services costs.



The District shall be responsible for any of the following costs associated with the operation of the amenity facilities:

Pre-employment Testing: Background and substance abuse reports shall be ordered for candidates identified to fill amenity positions.

Uniforms: Personnel shall wear community specific shirts provided by the District if required.

Cell Phone: Management personnel shall require a cell phone or a cell phone allowance. This phone will also be used as the contact number for the District for after hour emergencies.

Office Equipment: Personnel will require a dedicated computer, printer, and a digital camera as well as convenient access to an onsite copier and fax machine, provided by the District.

Mileage Reimbursement: Personnel shall receive mileage reimbursement incurred while performing the District's responsibilities when using a personal vehicle. Mileage shall be reimbursed at the rate approved by the Internal Revenue Service.



Rizzetta & Company

ADDITIONAL AND LITIGATION SUPPORT SERVICES:

Additional and Litigation Support Services will be billed hourly pursuant to the current hourly rates shown below:

Job Title:	Hourly Rate:
Principal	\$300.00
Vice President	\$250.00
Chief Financial Officer	\$250.00
Director	\$225.00
Information Technology Manager	\$225.00
Regional District Manager	\$200.00
Financial Services Manager	\$200.00
Accounting Manager	\$200.00
Regional Licensed Community Association Manager	\$200.00
District Manager	\$175.00
Licensed Community Association Manager	\$175.00
Amenity Services Manager	\$175.00
Clubhouse Manager	\$175.00
Senior Helpdesk Support Engineer	\$175.00
Financial Analyst	\$150.00
Senior Field Services Manager	\$150.00
Senior Accountant	\$150.00
Field Services Manager	\$125.00
Community Association Coordinator	\$100.00
Financial Associate	\$100.00
Staff Accountant	\$100.00
Information Technology	\$100.00
Accounting Clerk	\$ 85.00
Administrative Assistant	\$ 85.00



Rizzetta & Company

SECTION C

Innotech Construction Services, LLC
1077 Innovation Ave, Unit 112
North Port, FL 34289
(941) 204-0159
innotechconstructiongroup@gmail.com

Estimate

ADDRESS

Tamara Lorf
Lakeside Plantation
2800 Plantation Blvd
North Port, FL 33948

ESTIMATE # 1237

DATE 08/24/2021

DATE	ACTIVITY	DESCRIPTION	QTY	RATE	AMOUNT
	Sales	Gazeebo Repair Includes: Purchase and Replace with new - Shingle Roof. Tear off, dispose of, and replace with like-type to match. Purchase and Replace with new - Plank Flooring. Tear up, dispose of, and replace with like-type to match. Purchase and Repair existing - Railing.	1	4,500.00	4,500.00
Exterior - Gazeebo Repair		TOTAL			\$4,500.00

Accepted By

Accepted Date

SECTION D



Berger, Toombs, Elam, Gaines & Frank

Certified Public Accountants PL

600 Citrus Avenue
Suite 200
Fort Pierce, Florida 34950

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

September 15, 2021

Lakeside Plantation Community Development District
Governmental Management Services
4648 Eagle Falls Place
Tampa, FL 33619

The Objective and Scope of the Audit of the Financial Statements

You have requested that we audit the financial statements of Lakeside Plantation Community Development District, which comprise governmental activities and each major fund as of and for the year ended September 30, 2021 which collectively comprise the basic financial statements. We are pleased to confirm our acceptance and our understanding of this audit engagement by means of this letter for the year ending September 30, 2021.

The objectives of our audit are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with auditing standards generally accepted in the United States of America (GAAS) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users made on the basis of these financial statements. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.

The Responsibilities of the Auditor

We will conduct our audit in accordance with (GAAS). Those standards require that we comply with applicable ethical requirements. As part of an audit in accordance with GAAS, we exercise professional judgement and maintain professional skepticism throughout the audit. We also:

- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion.

Fort Pierce / Stuart

Member AICPA

Member AICPA Division for CPA Firms
Private Companies practice Section

Member FICPA



Berger, Toombs, Elam,
Gaines & Frank
Certified Public Accountants PA

Lakeside Plantation Community Development District
September 15, 2021
Page 2

- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances but not for the purpose of expressing an opinion on the effectiveness of the District's internal control. However, we will communicate to you in writing concerning any significant deficiencies or material weaknesses in internal control relevant to the audit of the financial statements that we have identified during the audit.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements, including the disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.
- Conclude, based on the audit evidence obtained, whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the District's ability to continue as a going concern for the reasonable period of time.

Because of the inherent limitations of an audit, together with the inherent limitations of internal control, an unavoidable risk that some material misstatements may not be detected exists, even though the audit is properly planned and performed in accordance with GAAS.

We will maintain our independence in accordance with the standards of the American Institute of Certified public Accountants.



Lakeside Plantation Community Development District
September 15, 2021
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The Responsibilities of Management and Identification of the Applicable Financial Reporting Framework

Management is responsible for:

1. Identifying and ensuring that the District complies with the laws and regulations applicable to its activities, and for informing us about all known violations of such laws or regulations, other than those that are clearly inconsequential;
2. The design and implementation of programs and controls to prevent and detect fraud, and for informing us about all known or suspected fraud affecting the District involving management, employees who have significant roles in internal control, and others where the fraud could have a material effect on the financial statements; and
3. Informing us of its knowledge of any allegations of fraud or suspected fraud affecting the District received in communications from employees, former employees, analysts, regulators, short sellers, vendors, customers or others.

The Board is responsible for informing us of its views about the risks of fraud within the entity, and its knowledge of any fraud or suspected fraud affecting the entity.

Our audit will be conducted on the basis that management acknowledges and understands that it has responsibility:

1. To evaluate subsequent events through the date the financial statements are issued or available to be issued, and to disclose the date through which subsequent events were evaluated in the financial statements. Management also agrees that it will not conclude on subsequent events earlier than the date of the management representation letter referred to below;
2. For the design, implementation and maintenance of internal control relevant to the preparations of fair presentation of financial statements that are free from material misstatement, whether due to fraud or error; and
3. To provide us with:
 - a. Access to all information of which management is aware that is relevant to the preparation and fair presentation of the financial statements including information relevant to disclosures;
 - b. Draft financial statements, including information relevant to their preparation and fair presentation, when needed to allowed for the completion of the audit in accordance with the proposed timeline;



Lakeside Plantation Community Development District
September 15, 2021
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- c. Additional information that we may request from management for the purpose of the audit; and
- d. Unrestricted access to persons within the District from whom we determine it necessary to obtain audit evidence.

As part of our audit process, we will request from management written confirmation concerning representations made to us in connection with the audit, including among other items:

- 1. That management has fulfilled its responsibilities as set out in the terms of this arrangement letter; and
- 2. That it believes the effects of any uncorrected misstatements aggregated by us during the current engagement and pertaining to the latest period presented are immaterial, both individually and in the aggregate, to the financial statements taken as a whole.

Reporting

We will issue a written report upon completion of our audit of Lakeside Plantation Community Development District's financial statements. Our report will be addressed to the Board of Lakeside Plantation Community Development District. We cannot provide assurance that an unmodified opinion will be expressed. Circumstances may arise in which it is necessary for us to modify our opinion, add an emphasis-of-matter or other-matter paragraph(s), or withdraw from the engagement.

Records and Assistance

During the course of our engagement, we may accumulate records containing data that should be reflected in the Lakeside Plantation Community Development District books and records. The District will determine that all such data, if necessary, will be so reflected. Accordingly, the District will not expect us to maintain copies of such records in our possession.

The assistance to be supplied, including the preparation of schedules and analyses of accounts, has been discussed and coordinated with Hannah Smith. The timely and accurate completion of this work is an essential condition to our completion of the audit and issuance of our audit report.

Other Relevant Information

In accordance with Government Auditing Standards, a copy of our most recent peer review report has been provided to you, for your information.

Either party may unilaterally terminate this agreement, with or without cause, upon sixty (60) days written notice subject to the condition that the District will pay all invoices for services rendered prior to the date of termination.



Berger, Toombs, Elam,
Gaines & Frank
Certified Public Accountants P.C.

Lakeside Plantation Community Development District
September 15, 2021
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Fees, Costs and Access to Workpapers

Our fees for the services described above are based upon the value of the services performed and the time required by the individuals assigned to the engagement, plus direct expenses. Invoices for fees will be submitted in sufficient detail to demonstrate compliance with the terms of this engagement. Billings are due upon submission. Our fee for the services described in this letter for the year ending September 30, 2021 will not exceed \$3,185, unless the scope of the engagement is changed, the assistance which Lakeside Plantation Community Development District has agreed to furnish is not provided, or unexpected conditions are encountered, in which case we will discuss the situation with you before proceeding. All other provisions of this letter will survive any fee adjustment.

In the event we are requested or authorized by Lakeside Plantation Community Development District or are required by government regulation, subpoena, or other legal process to produce our documents or our personnel as witnesses with respect to our engagement for Lakeside Plantation Community Development District, Lakeside Plantation Community Development District will, so long as we are not a party to the proceeding in which the information is sought, reimburse us for our professional time and expenses, as well as the fees and expenses of our counsel, incurred in responding to such requests.

The audit documentation for this engagement is the property of Berger, Toombs, Elam, Gaines, & Frank and constitutes confidential information. However, you acknowledge and grant your assent that representatives of the cognizant or oversight agency or their designee, other government audit staffs, and the U.S. Government Accountability Office shall have access to the audit documentation upon their request and that we shall maintain the audit documentation for a period of at least three years after the date of the report, or for a longer period if we are requested to do so by the cognizant or oversight agency.

Access to requested documentation will be provided under the supervision of Berger, Toombs, Elam, Gaines, & Frank audit personnel and at a location designated by our Firm.



Lakeside Plantation Community Development District
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Information Security – Miscellaneous Terms

Berger, Toombs, Elam, Gaines & Frank is committed to the safe and confidential treatment of Lakeside Plantation Community Development District's proprietary information. Berger, Toombs, Elam, Gaines & Frank is required to maintain the confidential treatment of client information in accordance with relevant industry professional standards which govern the provision of services described herein. Lakeside Plantation Community Development District agrees that it will not provide Berger, Toombs, Elam, Gaines & Frank with any unencrypted electronic confidential or proprietary information, and the parties agree to utilize commercially reasonable measures to maintain the confidentiality of Lakeside Plantation Community Development District's information, including the use of collaborate sites to ensure the safe transfer of data between the parties.

If any term or provision of this arrangement letter is determined to be invalid or unenforceable, such term or provision will be deemed stricken and all other terms and provisions will remain in full force and effect.

Because Berger, Toombs, Elam, Gaines & Frank will rely on Lakeside Plantation Community Development District and its management and Board of Supervisors to discharge the foregoing responsibilities, Lakeside Plantation Community Development District holds harmless and releases Berger, Toombs, Elam, Gaines & Frank, its partners, and employees from all claims, liabilities, losses and costs arising in circumstances where there has been a known misrepresentation by a member of Lakeside Plantation Community Development District's management, which has caused, in any respect, Berger, Toombs, Elam, Gaines & Frank's breach of contract or negligence. This provision shall survive the termination of this arrangement for services.

This letter constitutes the complete and exclusive statement of agreement between Berger, Toombs, Elam, Gaines, & Frank and Lakeside Plantation Community Development District, superseding all proposals, oral or written, and all other communications, with respect to the terms of the engagement between the parties.



Berger, Toombs, Elam,
Gaines & Frank
Certified Public Accountants P.C.

Lakeside Plantation Community Development District
September 15, 2021
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Please sign and return the attached copy of this letter to indicate your acknowledgment of, and agreement with, the arrangements for our audit of the financial statements including our respective responsibilities.

Sincerely,

*Berger Toombs Elam
Gaines & Frank*

BERGER, TOOMBS, ELAM, GAINES & FRANK
J. W. Gaines, CPA

Confirmed on behalf of the addressee:



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

Report on the Firm's System of Quality Control

To the Partners

October 30, 2019

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

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

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

Firm's Responsibility

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

Peer Reviewer's Responsibility

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

Required Selections and Considerations

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

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

Opinion

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

Baggett, Reutimann & Associates, CPAs PA
BAGGETT, REUTIMANN & ASSOCIATES, CPAs, PA
Signed Electronically by Judson B. Baggett, CPA, CVA, Partner on 10/30/19 email jdb@baggett-reutimann.com

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

**ADDENDUM TO ENGAGEMENT LETTER BETWEEN BERGER, TOOMBS,
ELAM, GAINES AND FRANK AND LAKESIDE PLANTATION COMMUNITY
DEVELOPMENT DISTRICT
(DATED SEPTEMBER 15, 2021)**

Public Records. Auditor shall, pursuant to and in accordance with Section 119.0701, Florida Statutes, comply with the public records laws of the State of Florida, and specifically shall:

- a. Keep and maintain public records required by the District to perform the services or work set forth in this Agreement; and
- b. Upon the request of the District's custodian of public records, provide the District with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes, or as otherwise provided by law; and
- c. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the Agreement if the Auditor does not transfer the records to the District; and
- d. Upon completion of the Agreement, transfer, at no cost to the District, all public records in possession of the Auditor or keep and maintain public records required by the District to perform the service or work provided for in this Agreement. If the Auditor transfers all public records to the District upon completion of the Agreement, the Auditor shall destroy any duplicate public records that are exempt or confidential and exempt from public disclosure requirements. If the Auditor keeps and maintains public records upon completion of the Agreement, the Auditor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the District, upon request from the District's custodian of public records, in a format that is compatible with the information technology systems of the District.

Auditor acknowledges that any requests to inspect or copy public records relating to this Agreement must be made directly to the District pursuant to Section 119.0701(3), Florida Statutes. If notified by the District of a public records request for records not in the possession of the District but in possession of the Auditor, the Auditor shall provide such records to the District or allow the records to be inspected or copied within a reasonable time. Auditor acknowledges that should Auditor fail to provide the public records to the District within a reasonable time, Auditor may be subject to penalties pursuant to Section 119.10, Florida Statutes.

IF THE AUDITOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE AUDITOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT/CONTRACT, THE AUDITOR MAY CONTACT THE CUSTODIAN OF PUBLIC RECORDS FOR THE DISTRICT AT:

**GMS-CF, LLC
4648 EAGLE FALLS PLACE
TAMPA, FL 33619
TELEPHONE: 865-617-8194**

Auditor: J.W. Gaines

District: Lakeside Plantation CDD

By: 

By: _____

Title: Director

Title: _____

Date: September 15, 2021

Date: _____

SECTION E

*This item will be provided under
separate cover*

SECTION VII

SECTION A

MINUTES OF MEETING
LAKESIDE PLANTATION
COMMUNITY DEVELOPMENT DISTRICT

The regular meeting of the Board of Supervisors of the Lakeside Plantation Community Development District was held on Wednesday, September 15, 2021 at 6:00 p.m. at the Lakeside Plantation Clubhouse, 2800 Plantation Boulevard, North Port, Florida.

Present and constituting a quorum were:

Joe Szewczyk	Chairman
Pina Chichelli	Vice Chair
Alan (Bud) Sabol	Assistant Secretary
Bill Roumy	Assistant Secretary
Bonnie Benjamin <i>(by phone)</i>	Assistant Secretary

Also present were:

Tricia Adams	District Manager
Sarah Sandy <i>(by phone)</i>	District Counsel
Brent Burford	District Engineer
Scott Smith	Vesta
Tamara Lorf <i>(by phone)</i>	Vesta
Justin Jackson	Innotech Construction Services
Residents	

FIRST ORDER OF BUSINESS

Roll Call

Ms. Adams called the meeting to order at 6:00 p.m. and called the roll. All Supervisors were present constituting a quorum.

SECOND ORDER OF BUSINESS

Pledge of Allegiance

The pledge of allegiance was recited.

THIRD ORDER OF BUSINESS

Audience Comments on Specific Items on the Agenda *(Speakers will fill out a card and submit it to the District Manager prior to beginning of the meeting)*

Ms. Adams: The next item on the agenda is the public comment period. This is an opportunity for any members of the audience to make a statement to the Board of Supervisors

regarding any items that are on the agenda. I received several Request to Speak Forms. They don't specify if you're looking to speak at the beginning of the meeting or during the second general audience comment period. The first audience comment period is for the agenda items and then later it's for anything that you would like to bring up that is not on the agenda. The Board adopted rules related to the public comment period. If residents who speak could please state your first name, your last name, and your address for the record, that helps us when we're transcribing the meeting minutes to have an accurate record. Also, each speaker is asked to limit their comments to three minutes. Mr. Chairman, would you like for me to call the residents?

Mr. Szewczyk: The ones who signed up?

Ms. Adams: Yes, we have several Request to Speak Forms that have been completed. If you came tonight to make a comment and did not complete a Request to Speak Form, that's fine. Just again, please state your name and address for the record. The one at the top of the pile is from Mr. Peter Gardner. Did you have a comment for the Board Members?

Resident (Peter Gardner, Boxwood Street): Yes. I have been a resident for about four years. My comment is related to the agenda item for Vesta Management Services. It sounds like it is being awarded this coming year without competitive bidding again. Is that correct?

Ms. Adams: This is not a question and answer session. It is more of a statement to the Board. Oftentimes, your question is answered during the discussion time when the Board discusses any questions that are lingering at the end of the meeting.

Resident (Peter Gardner, Boxwood Street): It is my understanding that it is an unsolicited proposal. My request is that when the Board goes through it, the activities that are included in their final proposal from Vesta, represent the activity level that was here prior to COVID. So, those are my remarks.

Mr. Szewczyk: Okay.

Resident (Peter Gardner, Boxwood Street): Thank you.

Ms. Adams: The next one is it looks like Mark. Is that Flynn? 1679, Scarlett.

Resident (Mark Flynn, Scarlett Avenue): I am not sure if my question is new business or not.

Ms. Adams: Would you like to make your statement now or would you prefer to wait until the second general audience comment period?

Resident (Mark Flynn, Scarlett Avenue): Like I said, I don't know if this is old business or new business. This is my first time here. I saw that there was a fee increase. I never really heard the results of that. I have a piece of paper saying that it was going up \$112 a year and then I've heard comments from other people saying that it looks like it is going up more than that. I've never really heard of finalization of what that is and even how that even was passed.

Ms. Adams: This is the time for public comments right now, but oftentimes your question is answered during the meeting.

Resident (Mark Flynn, Scarlett Avenue): Then I have information on the dog park. I'll probably wait until the meeting is over to hear what everybody else says. Can I comment again or do I have to fill out another piece of paper?

Ms. Adams: No, you're fine. There will be another general audience comment period. Next is Ms. Sue Martin.

Resident (Sue Martin, Scarlet Avenue): I have three items from unfinished business about something that I would like to comment on. First, I would like to address the proposed park. I would ask each Board Member to ask themselves this question. How would I like to have a dog park next door to my property, not to mention the additional parking? Answer that honestly before casting your vote. The residents who live adjacent to the property in question, purchased their home with the understanding that that property would remain green space. Your proposal for this area for a dog park lacks compassion. It infringes on the peace and tranquility of the residents. These homes are adjacent to your property. Aside from the parking and traffic, there would be a problem for feces. Can't we utilize a cul-de-sac at the end of Plantation Boulevard or maybe clear out an area behind the Clubhouse, perhaps where the fish pond used to be. That choice would not require street parking as there is already parking available here. Second, I would like to address the proposed fountains. At last month's meeting, Commissioner Roumy asked the engineer, "Can you explain how this is going to work and what these things will do?" Mr. Burford replied, "The fountains just provide aesthetics." In the agenda, the cost for the two proposed fountains is a total of \$20,618 on the low side and total of \$31,314 on the higher side. Add to that, \$24,247 for the necessary electric hookups. That would mean a total of \$44,865 on the low side to \$55,561 on the high side. Then after that, it's another \$1,160 annually for maintenance. It doesn't include the electric to run these fountains daily. That is a lot of money just for aesthetics. The other benefit is to the people who live adjacent to those ponds. The whole

community gets no benefit from this amount of money spent. My last remark concerns liability issues. We were recently told that a committee of volunteers who assist the amenities personnel that was not advisable due to liability issues. However, I recently scheduled a few small HOA committee meetings in the all-purpose room with Tamara. I requested one table and five chairs to be set up. She told me the info and said there would be no problem. When we came in for the meeting there was no sound. When I asked in the office why it was not set up, I was told, "We cannot not do that." So my question is, why is it not acceptable for residents to volunteer because it creates an insurance liability, while it is acceptable for residents to come in and set up tables and chairs for meeting? I would like a response to that question. Thank you.

Ms. Adams: Thank you for your comments. The next request to speak form is Ms. Donna Keller.

Resident (Donna Keller, Savannah Drive): I think I'm going to split my three items that I would like to address. The first one, Clubhouse staff, I would like to address that later because that's not really new business. The comments for now that I would like to address is I completely agree with Sue about the dog park. I had initially been for it until I realized the ramifications to the neighborhood around it. I do not think it's a good idea and again I agree with her. How would you like to have that next to your home? The next thing that I would like to address is also the fountains. I think that's a lot of money to spend on fountains, when the fountains that we have up at the front entrance, I believe we've already spent about \$20,000 in maintenance this year on them and they're still not running. So, I think that it is a big waste of money and is going to be a big draw on our maintenance. I think it's a really bad idea. Thank you.

Ms. Adams: Thank you. The next person is Ms. Fran Dobler.

Resident (Fran Dobler, Scarlett Avenue): I would like to save that until later.

Ms. Adams: That's fine. The next person is Ken Moyer.

Resident (Ken Moyer, Scarlett Avenue): The dog park is an issue. Like she said, how would you like it between your house or beside your house? I read the notes and there's no scenario about feces being left in that area already. I imagine it will affect the traffic. People will be able to come there and leave dog feces. On a hot summer's day, can you imagine how that is going to smell? It's a poor location. You've got a lot right up front right behind the gas station. Not a problem. Clear it up and put it up there, away from everyone's homes. It isn't going to bother anybody. There would be no traffic and no parking. It's a very beautiful and aesthetic

area. Why ruin it with a fence and a dog park and a parking lot. The fountains were just aesthetic. That's a lot of money for fountains when we can't even keep the two up front running.

Ms. Adams: The next one is Dave. Is it Dobbler?

Resident (Dave Dobbler, Scarlett Avenue): Dobbler. I'm one of the original tenants. Way back when I purchased this property, I was told that there was a preserve next to me and a preserve across the street. Now, all of a sudden, I find out that you are going to possibly build a parking lot in there and a dog park. If the parking lot is across the street, it's going to impact some of the wildlife that we've got here. Some of that wildlife are endangered species. We have panthers that go back there. We have bobcats. We have wild turkeys. One of the things we have back there and back by my house is gopher tortoises. I've seen them. They've actually dug holes in my garden where they lay their eggs. I think we should possibly have a crossing like we see on some properties. Also, it will definitely degrade the value of my house. We paid a premium for those lots and not just a low premium, quite a substantial amount. Also, as far as the dog park is concerned, do you know that most areas refuse to use dog parks because all they do is attract disease? You can have your dog taken care of as far as shots and vaccinations, and all things are like that; however, there's no guarantee that the person next to you has been taking care of their dog the same as you. So, you go in there and notice that there are feces all around and it is going to seep down into the soil and sweep across the street into the wetlands. You are going to come down with parvo. You're going to come up with some other type of thing. If you get a dog park, the first thing you do in a dog park is say, "Well, I need a dog park for little dogs and I need a dog park for big dogs." So, what's going to be the limit? You've got a 3-pound dog over there, you've got a 5-pound dog over there and a 150-pound dog on the other side. We all know that a 3-pound dog is nothing more than lunch for a 150-pound dog. That's exactly what's going to happen; dog fights. If a dog bites another dog, who you going to sue? The CDD. Now, all of a sudden we have a dog that's going to attack you and if it's not your dog, who you going to sue? Who's going to take responsibility for those things? There's too much hassle and too much aggravation in a dog park, besides the smell. Just like everybody's saying now, imagine it next to your house. Thank you.

Ms. Adams: Then we have David and Dawn Winchester.

Resident (Dawn Winchester, Scarlett Avenue): Good evening. Thank you for your service to our entire community. My comments and questions all have to do with the dog park

and parallel parking. For the past 17 years, our multi-generational residents have been able to enjoy passive recreation like taking advantage of green spaces throughout our community, walking their dogs, taking walks, and bike riding. In addition, when residents have guests over, they had been able to take advantage of temporarily parking on the shoulder areas, which is legal according to the City of North Port and the Police Department; provided the car is parked in the direction of traffic. A well planned community dog park should be a minimum of three acres, up to 10 acres. The green space you proposed for the dog park is less than an eighth of an acre. This means our neighbors on each side of the park lose quiet enjoyment in our community. In addition, parking spaces will cause more traffic problems, which are already a major concern on Scarlett Avenue. In your meeting minutes from May 19, 2021, Ms. Adams stated “But I want to point out that it's very unusual for a Board to define an improvements to a community that benefits a small number of households. So, typically with CDDs, you want to look at the overall benefits of the community and not a benefit to a small number of households”. Later, Ms. Chichelli stated, “Going back to what you said, are we doing something just for a part of the community and not for the entire community?” With that said, here are my questions. Hopefully, you'll answer them later. Would you please explain how this proposal will, “Be an added beautification/benefits to our entire community? Second, who will maintain and clean this dog park and who will police the parking spaces and the dog park? Third, why should the residents of Lakeside Plantation pay to erect a dog park and maintain it when there are freestanding dog parks maintained by the county, supported by our taxpayer dollars less than eight miles away? Thank you for your time.

Ms. Adams: Mr. Chairman, I don't have any additional Request to Speak forms, but I will check with the audience to see if there's anyone here who did not complete a Request to Speak form, who would like to make a statement to the Board of Supervisors regarding any agenda items.

Resident (Barbara, Scarlett Avenue): I do.

Ms. Adams: Please use the microphone and state your first and last name and address.

Resident (Barbara, Scarlett Avenue): This is my first meeting. I'm a new resident. I'm here about the proposal for the fountains. I think a better use of that money would be to paint the pergola out front and clean up the trash. I personally am an advocate of when you drive into your community or into your home, it is the first impression that sticks with you. I walk every

morning two or three miles and always to the front. About two or three weeks ago, it looked like pergola country up there. I know that we had bad weather, but there's no excuse for that stuff laying around looking terrible. The pergola needs paint. You need a professional that knows how to fix the cracks, get the correct paint and have it looking good. Also, the shrubbery up there is pitiful. It's really pitiful. I know that they are planting new flowers, but you need to address the shrubs. That's all I have to say. So, save that \$20,000 and clean up the front.

Ms. Adams: Are there any other audience members who would like to make a statement to the Board?

Resident (Fran Dobler, Scarlett Avenue): Again, I'm here for the dog park issue. It is between two houses. The fact is that they are noisy. I've been in parks where there are dog parks. When dogs are fighting, they fight. When people get in there to try to get their dog, I've seen that person be attacked. So, I don't want to have to hear that. I don't want to see it. Plus, with the feces and urine, it gets into the soil and into the water system. At certain times, they don't want us to use fertilizer because of that. I think feces and urine is worse. It is part of the Southwest Florida Watershed. Actually, with dogs getting vaccinated, other dogs can get sick from that, which is a big issue. You have to live there to see it. We are there early in the morning and we've seen the panther. There was a family. We've seen the bobcats. We've seen them all. They all cross through there. Wild turkeys were there the other day. They all cross over that open space because it's safe for them. The gopher tortoises, they are an endangered species too. I can't tell you how many times we've gone into the street and picked one up because they are trying to get to the other side, but like my husband said, they dig their nests there. We saw one in our yard. They also dig along the side. They are endangered. You just can't build a parking lot there and interrupt their life just for a parking lot for a few people to use it. It's not aesthetic looking. We are not a condominium or townhouse area. We were designed to look this way. This is the way the builder designed our community. It needs to stay that way. I'm not going to be able to sell my house. Who is going to sit there? I am going to sit on my lanai and see a dog park and a parking lot. You don't know who is going to be parking there. Who is going to be leaving their cars there? Plus, there are people that own commercial vehicles that park. I don't want to see that there. This is not that kind of community. You are a mixed community. Yes, and it's wonderful to see. I'm glad we bought here because of that, but I don't want to see our area ruined. Those cars that are down the road, that's temporary. The kids leave and they go. Also people move. So,

you have a lot of movement here of people moving out. So, that's the only thing with the dog park and the parking lot. Thank you.

Ms. Adams: Thank you. Is there anyone else in the audience who would like to make a comment?

Resident (Jim Coppola, Scarlett Avenue): I just wanted to state for the record that I'm against the dog park for every reason everyone said, the aesthetics and the upkeep. You have a beautiful community here. I don't think it's going to add anything. It is certainly not going to be for everyone, so I'm against that. The other question is, what is the status of this because I didn't hear about it until after it was already voted on. So, I would like someone to clear that up or is it still under discussion? The other question is, is electric going to be put in with lights in the parking lot and someone has to maintain that too in order for it to be a parking lot? Dogs don't drive. I think somebody may want to use the parking lot for overflow parking. Therefore, I'm definitely against it. I want to be on the record for that. I'm also against spending \$50,000 for fountains just to have water going up in the air. Thank you.

Ms. Adams: Are there any other members in the audience who would like to make a comment or statement to the Board of Supervisors? Alright. There will be another opportunity as we move through the agenda.

FOURTH ORDER OF BUSINESS

District Engineer's Report

Ms. Adams: Typically, this Board has a history of sequestering all of the District Engineer Reports to the beginning of the meeting. Our District Engineer is here on billable hours, so that's a way that the District saves some funds by putting these items first. So, Brent is here with us this evening and he does have some items to report to the Board.

Mr. Burford: Hello. I have just a couple of items to discuss. One of them I think is pretty short. The Board asked me at last meeting to put an exhibit together of the proposed parking and a dog park, which I provided to the Board Members. It showed the layout of the parallel parking and the proposed dog park. If there are any questions on that, let me know. No decisions were made on that. It was just for their review.

Ms. Adams: Board Members, do you want to take these items one at a time and discuss it and determine if you want to take any further action or if you want to otherwise take action regarding the dog park? The schematic that was provided by the District Engineer is a layout. It

does not include any associated costs with the dog park. Is the Board interested in the District Engineer or staff pursuing additional information as it relates to potential costs? What is the pleasure of the Board?

Mr. Roumy: Let's discuss it. I picked up an article from the *The New York Times*. It's from *The Smarter Living*. It says, why a dog park is not a good idea? This is more just for the Board Members to understand the feeling of the community and why it's a bad idea. So, I'm going to summarize it in four sections here. First of all are the requirements for a dog park. Second, the dog owners concern about their dogs playing in a dog park. Third, the maintenance associated with a dog park and lastly, the community concern. So, very briefly, to say the requirements; first, you need at least maybe one acre, minimum half an acre lot. Second, the location must be on the outskirts of the community. If you want to build a dog park, put it on the outskirt of the community. That's what the *The New York Times* says. Third, the fencing must be high enough so the dogs don't jump over. The gate has to be a doubled gated gate, so when a dog comes in, no dogs can escape through the gate. The area has to be a separate enclosure for large dogs and small dogs. You don't want to have over a 35-pound dog. According to the article, a 35-pound dog can kill a five-pound dog. Alright? So, we need a separate enclosure; one for large dogs and one for small dogs. The surface must have no grass, no sand, none of it. There has to be a quarter of an inch crushed stones, so it can permeate through the ground and the rain can wash it off. For the infrastructure, you need clean water for the dog to drink. You need dog fountains and maybe the power to do that. You need benches for the dog owners so they can sit down and talk about the weather. You need rules and regulations and it's a liability. You need receptacles for dog poop. I love dogs, but I don't have a dog. A lot of people take their poop and throw it into the preserve. The second section is the dog owner concern, disease spreading between dogs. The dog will pick up bad habits; dog fights, body language of dogs, in case it doesn't go well between dogs sometimes, injuries such as bite wounds, muscle strain, tearing your ligaments from launching, from running all over the place. Then there is vaccination. We don't know if this dog is vaccinated and that dog is not. Then there is barking and rolling, which is very, very bad. We also have maintenance. We need a daily removal and cleaning the poop receptacles. Someone has to do that. The routine is to refresh and turn over the ground. You cannot just leave it there and forget about it. We need supervision. Then there is the community concern; barking and noise, more traffic alongside Scarlet Avenue. Our community is surrounded by bobcats. Once

they know Lakeside has a dog park here, everybody's going to come here to bring their dogs to run around. The bottom line is you have to weigh out the risks and benefits. I think the risks outweigh totally the benefits of a dog park. Dog parks around us are plentiful. I can name four dog parks within 10 miles. There is one in Venice, Port Charlotte and right here in North Port. Having a dog park is not a good idea. Mr. Chairman, what you want to do?

Mr. Sabol: First of all, I'm not an advocate for *The New York Times*, but that's fine. *The New York Times* in this instance is correct. Now, I was an advocate in the beginning of the dog park, but when you stop and realize what's going on here, I don't think it's a good idea at all. Because just like you mentioned, you spread diseases and that's going to happen. Okay. If you look at the overall deal here, you'd be inviting people from the whole area to bring their dog here and we don't need that. I love dogs too. My daughter has dogs and we all have dogs. Dogs are nice, but they should be taken care of by the people and the people should clean up after them in a proper manner. That's what brought this about. I think at this time the general consensus of the audience and of us, I don't think that a dog park is a good idea. Thank you.

Mr. Roumy: To add to this, two years ago, I witnessed the dog across the street go after Camille. He's over 50 pounds. He jumped over Camille and wanted to kill her little dog. So, you imagine that in one little enclosure.

Mr. Sabol: My daughter has two dogs; one 180-pounds and the other 185-pounds. They are good dogs, but the dog size does have some problems. There was an issue about eight years ago where a man killed a dog with his cane and a knife, because he was upset about it. This is going to happen, but you have to live together and obey the laws and so forth. As far as I can see, the dog park could not be adequate here. It's not a good idea.

Mr. Szewczyk: I think your last two comments really don't have anything to do with a dog park. Okay? At the beginning, I was an advocate, but as I look through this list, a lot of good points were brought up. A lot of points that I wasn't even thinking of. I'm not far from the dog park, only about six houses away, but it would still be in my line of sight. I would probably still hearing what was going on down there. That's not to say that something like this in another location in the community might not be a bad idea, because it is more residential. I forgot who made the comment regarding having it on the outskirts of the property.

Mr. Roumy: I did.

Mr. Szewczyk: Every decision I make up here is to increase the value of my house. I'm looking at the entire community. When I look at it from that standpoint, a dog park for all of the dog owners in this community would be a benefit. Maybe not in the location it's at. We were only expecting about seven people here tonight. That's all the chairs, so I can understand the strong feeling. I do recognize that almost everybody that has spoken is probably within three houses or four houses of the site. Sometimes it's a bad thing when you look at the things and say, "Not in my neighborhood," because I'm trying to think of the entire community. So, even though it sounds like I want to push this forward, there were enough good points brought up tonight that it's probably not a good idea to have a dog park specifically in the location that's at. So, my recommendation would be to move on.

Ms. Chichelli: Can I just make a comment? I just want to make sure that this was just something that we wanted to check into. It wasn't something that we wanted to do right away. We wanted to check how far or all of those issues you brought up. Sometimes when you see something in the agenda and say, "Oh, they are doing something," we have to tell them, "We are just checking into something." We are thinking about the whole community. That's the main thing. That's my opinion. Just so you feel more comfortable when you see something in agenda, we are not done. We are having a discussion to make sure that we make the right decision for the whole community.

Resident (Not Identified): That's why we're here.

Mr. Sabol: You spoke about my point.

Mr. Roumy: We cannot have a dog park in our community. The reason behind it, they're going to attract people from outside the community.

Mr. Szewczyk: That's one of the issues that I wasn't thinking. Originally, I was trying to limit the number of cars parked there and the hours to park there and the signage. I didn't think about how we would monitor it. It's one thing to have it around the Clubhouse, but an entirely different thing when it's a half of mile away and who is using the facilities. We were still in the information gathering stage. Honestly, I don't think there's a need to continue gathering information on this topic.

Ms. Adams: Mr. Chairman, based on your discussion, staff will remove this item from the Action Items List and staff will not take any further action unless there's Board discussion at a future time directing staff.

Mr. Burford: Supervisor we had some questions last month in regards to our invoicing. I went back and reviewed emails, phone logs, and photos. Everything that I could to get back on the invoices and I didn't find anything out of order. The only thing that I did find is that I do need to make better comments along with my times.

Mr. Roumy: More details.

Mr. Burford: More details in my comments.

Mr. Roumy: Thank you.

Mr. Burford: That will solve these issues.

Mr. Roumy: Thank you very much.

Mr. Burford: So, we got that out of the way. The next item is the drainage on Magnolia Circle. They made the repairs back there. The swale looks really good. They got the inlets that will collect the remaining standing water and they got it piped to the perfect location. We still need a little bit more sod in there. I looked at it on the way in this afternoon. So, I'm making a recommendation that we just release 80 percent of the funds to the contractor. That will help cover his material cost and some of his labor. I'll meet with him tomorrow and see about getting the rest of it finished up. The other item I think last week or last month, there was discussion of speed humps.

Ms. Adams: Correct. Traffic calming up once you were gone from the meeting, so I followed it up with you after the meeting via electronic mail to let you know that the Board was interested in reviewing some traffic calming as it relates to speed humps or speed bumps or speed tables.

Mr. Burford: I've done a little research into it. I think it has been tabled to the next meeting.

Ms. Adams: Yes. Brent has provided some information that had previously been presented to the Board of Supervisors regarding the locations that were recommended by the District Engineer in order to attain the desired speed. That information is under review and we need to get an updated price proposal based on their current material costs. So, that information will be coming back to the Board at a future meeting. We don't have anything prepared for Board consideration today.

Mr. Sabol: Okay.

Mr. Burford: The only other that I have is the drainage issue with the pool equipment in the back. We've met with the contractor to look at it. I would like to meet with them again to look at a little bit more thoroughly. The day that I met with him, he showed me what was going on. I looked at it this afternoon again before the meeting and I've got some more questions that I would rather get clarified with him before we do anything else with that.

Mr. Szewczyk: Just so everyone knows, the drainage issue we are talking about, is the one of the main reasons why our motors and things with the pool area keep going out.

Ms. Adams: Yes, it is an important issue and Brent is planning to meet with the contractor as soon as possible to look at the specifications that are proposed and ensure that the work will get a solution that you want to have.

Mr. Burford: The only other item that I have is that I provided everyone tonight with a map showing the lake numbering system and the preserve numbering system. We've also got a larger map that can be presented at the meetings if needed.

Ms. Adams: Board Members, specifically, this map is being provided to aid the discussion regarding the Amenity Policies as it relates to fishing on the district ponds. It will probably be worthwhile to have the District Engineer stay for that discussion and also to stay for any discussion regarding the consideration of fountains or aerators because he is the one who has been working with the contractors regarding the specifications and the project.

Mr. Burford: Yeah, the only other item that I wanted to mention about the map is the numbers on this map here is from the Southwest Florida Water Management District (SWFWMD) permit. There was another engineer firm I believe that was here at one time. Apparently, they came in and just numbered the lakes as they drove in. So, there's always been confusion about Lake 3 or Lake 5. I think if we stick with this map, it will reduce all the confusion. That's all I have to report this time unless anybody has anything.

Ms. Adams: No, just to piggyback on your comment though regarding the pond numbering system, it's possible that SOLitude has a different map numbering system. So, we'll try to get everyone on the same page and refer back to the numbers that were identified in the permit. That's a good suggestion.

Mr. Burford: I think the SOLitude is using the other system.

Ms. Adams: Yeah.

Mr. Burford: That's all I have this time unless the Board has anything for me.

Mr. Szewczyk: Nope.

Mr. Roumy: Are you talking about the ponds?

Ms. Adams: We will be talking about the ponds as it relates to the Amenity Policies and fishing on the ponds. We'll also be speaking about the ponds as it relates to the fountains and aerators. Yes, sir. If there's no other questions for Brent, Mr. Chairman, would you like me to move forward in the agenda?

Mr. Szewczyk: Yes.

FIFTH ORDER OF BUSINESS

Unfinished Business

Ms. Adams: We don't have any unfinished business.

SIXTH ORDER OF BUSINESS

New Business Items

A. Continued Public Hearing on the Amended and Restated Amenity Facilities Policies and Amended Amenities Rates, Deposits and Fees

Ms. Adams: We need a motion from the Board to open your continued public hearing for the Amenity Policies as well as the fees.

On MOTION by Mr. Szewczyk seconded by Mr. Sabol with all in favor the continued public hearing on the Amended and Restated Amenity Facilities Policies and amended Amenities Rates, Deposits and Fees was opened.

i. Public Comment Period

Ms. Adams: Alright. So, we are open for consideration of the Amended and Restated Amenity Facilities Policies. These policies have been reviewed by Board Members at multiple meetings. Board Member input has been incorporated into the proposed policies. The majority of the work was done in the tennis section and the Amenity Manager identified Tennis Policies that were posted on signage, but perhaps not documented in your Amenity Policies. She also met with some of the tennis members regarding their input. Then, as a result, that information was incorporated into the policies. This is, I believe, the third time the Board is renewing that tennis section. Last month, where we stalled out a little bit in discussion was in the discussion about the current policies as they relate to fishing on the ponds. Right now, the District has a policy that's in place and Board Members can confirm that policy or change that policy. That policy is that all

of the ponds are available for fishing as a recreational activity. There was a suggestion that some of the ponds are surrounded by private property. There's not really any District property that provides access to the pond. In some cases, the people whose homes backs up to a pond, may not be comfortable with having people right outside their screen door fishing on those ponds and in some cases, going across private property to access those ponds. There was a little bit of discussion last month. I think we decided to continue the hearing tonight for your Amenity Policies and perhaps look at the pond map to see if the District wants to keep the policy how it is or if the District wants to identify certain ponds that are most appropriate for fishing based on access. Those are the ponds where fishing is allowed and then restrict fishing at the other ponds. So, this is a policy issue. It's totally up to the Board. There are no regulations that we're looking to enforce as it relates to the stormwater system permit. Brent, do you have any comments just generally as it relates to the stormwater system as a utility versus recreational asset or any comments as it relates to the consideration of fishing on the ponds?

Mr. Burford: Well as far as the ponds themselves, I don't think there is any issue. Again, it's access. The CDD does have a lake maintenance easement around the lakes. They own the lakes. There is property around the lakes behind the homes. The question is them accessing between the homes. There are drainage easements between the homes, but they belong to the CDD for maintenance purposes. It's not...

Ms. Adams: Recreational access.

Mr. Burford: Recreational or ingress/egress for the general public.

Ms. Adams: Board Members, did you follow that discussion in terms that, in some cases, although the District may benefit from a maintenance easement, we don't, in fact, own the property where the easement is. It's private property until you get to the District property immediately surrounding the pond. So, the District owns the stormwater system, including the underground piping. Anywhere that there's a drainpipe the District has a maintenance easement so that if we need to, we can go in and perform maintenance but sometimes those easements are on private property. Often those are on private property. This item is ready for Board discussion. I should have pointed out that included in your agenda packet under Tab A is a clean copy of the Amenity Policies. I will bring you to the section regarding fishing, which is near the end of the document.

Mr. Roumy: On Page 15.

Ms. Adams: Thank you, sir. On Page 15, the way that your policy reads now is, "Residents may fish from any District owned lake or retention pond within the Lakeside Plantation Community Development District."

Mr. Sabol: The way it is right now, you may fish and you return the fish to the ponds. You are not allowed to keep the fish.

Ms. Adams: It's a recommendation of a Catch and Release Policy. These are stormwater ponds. They are full of pollutants. Correct.

Mr. Sabol: How many complaints do you know that we had about people complaining about crossing between their homes?

Ms. Adams: Yeah. I'm aware of one person who's identified that there are several in the vicinity who are concerned about the quiet enjoyment of their home.

Mr. Sabol: In order to get to those ponds, we would have to follow a pathway on an easement to get there if someone wants to fish.

Ms. Adams: There is no pathway on an easement because the easement is for maintenance. The easement is not for recreational access.

Mr. Sabol: So, we would have to post signage then?

Ms. Adams: Not necessarily. I think the key might be to identify the places that are appropriate for fishing. You have several ponds where there are wide open spaces where the adjacent property is owned by the District and they can be accessed easily by anyone who wants to fish without going through private property. I'm going to lean on Brent a little bit to help with this because he's most familiar with the ponds here. When you drive in the community, for example, the ponds that are being considered for fountain installation, it appears that there is significant District property surrounding those areas that would provide fishing access.

Ms. Chichelli: Which is Lake Number 3.

Mr. Burford: You've got your first two when you come in; Lake 1, Lake 19 and Lake 3.

Ms. Adams: Yes.

Mr. Burford: Lake 5 and of course Lake 10. Then where you get into questions is whether Lake 14 is accessible. Like 11 is...

Ms. Adams: Lake 14?

Mr. Burford: Lake 14 is the small one down in the middle. It's kind of a gray color.

Ms. Adams: Okay. It looks like a conservation area. I see it.

Mr. Burford: It's like Lake 11, the pork chop lake, as we refer to. It is pretty much surrounded by homes where you wouldn't have access. But the area where we were talking about having the dog park, they could actually enter that section through that Preserve Number 23 and make their way to Lake 11.

Ms. Adams: I see that. So, the District Engineer has identified Pond 1, Pond 19, Pond 3, Pond 5, Pond 10, Pond 14 and Pond 11 that have District property and easy access without going over anyone's private property to get to those lakes. This is an item for Board consideration.

Mr. Sabol: Why don't I just post signs on them, the ones that permit fishing and the ones that are not, post "*No Fishing*" signs.

Ms. Adams: Once the policies are finalized and adopted by the Board, through the email blast system, we will send out the updated Amenity Policies and then any items that we need to draw residents attention to, we certainly will. I do want to mention that your policies allow for progressive discipline as it relates to Lakeside Plantation residents who would choose to not comply with policies. So, if you have someone who's bringing glass to the pool and does that over and over, there's a progressive disciplinary process where they get a verbal warning, then a written warning and then a suspension that's reviewed by the Board. With fishing, the enforcement of the policies is more problematic and more difficult. So, I do want to let Board Members know that the goal is through communication to promote voluntary compliance and to help residents understand where the best locations to fish are.

Mr. Sabol: It seems like a little bit of PR would be involved. It would just be good just to speak to people so that we get along instead of putting rules and laws and re-doing it. Maybe that's the way to do it.

Ms. Adams: Yeah.

Mr. Szewczyk: I don't have a problem with the way the rules are now. Okay? I sit on my lanai and see kids coming by, fishing out the back and I say, "Hey, what are you using? How many did you get?" It opens up the conversation. It's something that the kids can do free of charge and you know what, they are outside, not working their thumbs, fine. Let them fish. I've walked out my back door also with a fishing rod every once in a while, throw it out there and give myself five minutes to catch a fish and go back inside. I don't think we need to change anything regarding the Fishing Policy. If there's an area that people are cutting through private

property and upsetting people, then let's deal with that as an isolated incident. Okay? How we would do that? I don't know, but let the kids fish.

Ms. Adams: Really that would become a law enforcement matter because they're trespassing on private property. It's not really a District matter when they are on private property. That would be the communication that we give to residents, is if somebody is on their private property, call the police.

Ms. Chichelli: Sorry, I just want to say one comment. When we have that kind of incident, how can we tell the group of people not to fish there, if we have here in the policy that they can fish anywhere within the community? Because they can come back and say, "Well, it says here that I can fish anywhere."

Mr. Szewczyk: Maybe the issue is not so much the fishing but the access, right?

Ms. Adams: Yes. Supervisor Szewczyk, you brought up a good point when you mentioned that you at the rear of your own private property can access the pond. So, even in cases where the ponds are completely surrounded by private residential property, the residents who live on that property may benefit from the ability to walk out their back door. So, that is a consideration.

Mr. Szewczyk: That's why I don't feel the need to change anything regarding this.

Mr. Roumy: I agree with you.

Mr. Sabol: I agree with you on that.

Mr. Roumy: However, I have a question for you.

Ms. Adams: Sure.

Mr. Roumy: It says here, "Please check with the Facility Manager for rules and regulations pertaining to fishing." What are the Rules and Regulations pertaining to fishing?

Ms. Adams: Fishing is actually regulated by the Florida Fish and Wildlife Conservation Commission (FWC). They would just provide information if people want to check regarding if they need a license or that type of matter.

Mr. Roumy: The Facility Manager has the Rules and Regulations on hand?

Ms. Adams: Just referring them to FWC. FWC maintains a website that has a lot of information. Also, that would be an opportunity for the Amenity Manager to communicate to anyone who would like to fish some of the better ponds that have access like right here behind the Clubhouse, etc.

Resident (Not Identified): What about people that are fishing that don't live here.

Ms. Adams: Ma'am this is the time for Board discussion. I'm happy to answer questions following the meeting.

Ms. Chichelli: Can I ask the same question that she did? What about the people that don't live here and you go and approach them, "What are you doing here?" and they talk back to you?

Mr. Szewczyk: I think that's minimal.

Ms. Chichelli: Really?

Mr. Szewczyk: Yes, I do.

Mr. Roumy: They park on Plantation Boulevard.

Mr. Szewczyk: Yeah, I see people parked out there and fish.

Mr. Roumy: I know a couple of them. Ten minutes and they're gone.

Mr. Szewczyk: I don't feel we need to change anything regarding the Fishing Policy.

Mr. Roumy: That's good.

ii. Consideration of Resolution 2021-07 Amending Amenity Facilities Policies, Rates, Deposits and Fees

Ms. Adams: Board Members associated with this Amenity Policy is a resolution that would adopt this Amenity Policy, Resolution 2021-07. If the Board approves it, we'll put these policies in place. These policies can be amended by the Board from time-to-time and they do allow for progressive discipline for those who are not complying with the Amenity Policies. So, we are seeking a motion to approve Resolution 2021-07. Before the Board takes any action on this, there is a public comment period that we need to have. I'd also like to reach out to District Counsel in case there are any comments regarding the policy documents. Mr. Chairman, would you like to take any comments from District Counsel first or public comments?

Mr. Szewczyk: Public comments, just in case District Counsel has to respond to any of those comments.

Ms. Adams: Certainly. So, this is an opportunity for any members of the public to make a comment as they relate to the Amenity Policies at Lakeside Plantation Community Development District. So, if you would like to come up to the front of the room so that you can address the Board, please state your first name and last name and address for the record and you can use this microphone.

Resident (Not Identified): I'm hoping that this is about amenity fees for the Clubhouse. Is that what you're talking about?

Ms. Adams: Soon the Board will be talking about that, not right now but soon. If you have a comment about that, go ahead. Is that okay, Mr. Chairman?

Mr. Szewczyk: Yes.

Resident (Not Identified): Thank you. There's going to be a function here in two weeks and residents are having the function here. We never pay anything to have a function here. I understand if you want to have a baby shower, birthday parties, whatever you want to have here, if it's outside the community, there should be a charge. But for residents who are already paying \$1,600 on their Tax Bill, I don't see why there is any reason that they are charging for the residents to have things here. If you want a fee to set up, I can understand that, but for resident functions, I do not understand it and neither does a lot of people here. What they are doing is, they are charging for this room and the kitchen. Even if it's being catered, they are still charging for the kitchen. To me, that doesn't make any sense at all. We're talking a lot of money, not a little bit of money, a lot of money. For the residents, I just think it's not fair. When we had a lot of people gathered in the library earlier when we first moved here, the Amenities Manager came out and said, "We're not going to charge for residents having functions here as long as you sign up for it," and we did. Then I was told by the current manager, that that was negated. I said, "Well, we were grandfathered followed in." No, we're not doing that anymore." So, I just think it's an unfair thing. That's all.

Ms. Adams: Are there any other public comments related to the Amenity Facilities Policies? Hearing none, Sarah, did you have any comments regarding Resolution 2021-07 or the Amenity Policies?

Ms. Sandy: I didn't, unless the Board has any questions for me. I believe that there is more detail regarding the rates as reflected in the agenda package. The rate will be adopted based on what was shown in the agenda package, unless I hear otherwise from the Board.

Ms. Adams: Yeah, we can move right into that discussion regarding the fees that are attached as Exhibit B. So, in your agenda packet under Tab 2, Exhibit B is your amended rates for certain fees that are collected here at Lakeside Plantation. The first page have the amounts that were noticed in order to schedule the rule hearing. So, just going through that fee list, the first two access cards are free. Additional replacement cards are \$10, guest cards are \$10 and

then it has the rental of the Green Room for a fee of \$250 and a deposit of \$300. Again, these are fees if somebody wants to rent for a private event, such as a birthday party or a shower, or some type of family event. There are no fees that are collected for Lakeside Plantation groups and clubs, Homeowners Associations, etc. These are for private events, that are not community related. Then the rental of the multi-purpose room is \$25 an hour. The multi-purpose room is also called the library. The notice amount for late hours after 9:00 p.m. is \$50 every half hour and our fee for access if it's before the start of rental time, is \$25 an hour. One thing that the Board added this year is consideration of rental of tables and chairs. From time-to-time, residents request, private use of the tables or chairs and that's \$10 a day for one table and six chairs with a \$50 deposit. The most substantial changes were in the tennis program. These fees that are noticed here, the Board can set the fees up to the cap that has been noticed. Sometimes Boards like to adopt the fees at the advertised rate, because that gives you flexibility moving forward to not have an expensive rule hearing, which does require a 28 and 29 day legal notice. It's an expensive legal notice. So, you do have the flexibility to set your fees at your advertised rate. Then as part of the budgeting process each year, the Board set the tennis membership fees based on some other considerations. Earlier this year, Supervisor Roumy prepared a recommendation for fees that was based on anticipated number of uses and benefits that different categories of tennis members would benefit from. Ultimately, that same information was turned into a budget worksheet that's included in your agenda packet. So, there is a tennis fee budget worksheet using the numbers that Supervisor Roumy recommended for your first year. We would have the single tennis membership for one month at \$75, at three months for \$185, six months for \$385 or for 12 months at \$640. Then there's also a daily fee. There's also a family membership consideration for one month at \$150, three months at \$315, six months at \$630 or 12 months at \$1,200. This worksheet contemplates an inflationary index each year being applied of about 3%. So, using this as the worksheet each year as part of the budgeting process, the Board can set the membership fees based on the current conditions, the current market, but you have flexibility up to the rates that you adopt today, which will be a cap. Does that make sense?

Mr. Roumy: I thought the cap was already established.

Ms. Adams: Yes. There was one cap that was established when we placed the legal notice and the amounts that are in this chart were included in the notice. That is a cap, so you cannot set rates that are higher than that tonight. What you adopt as your tennis fees will be your next cap.

In order to give the Board the most amount of flexibility, I recommend that you adopt the fees at the advertised rate, because that way, you don't have to have another rule hearing related to tennis fees for quite a while. Because the family package at \$2,000, it will take you quite a few years to get there if we're looking at what the Board directs every year as far as what should be charged with your tennis program. So, the Board can set a cap, but then charge a lesser amount. You just can't charge a higher amount. Does that make sense?

Ms. Chichelli: That's for the purpose of this hearing, right?

Ms. Adams: Yes. For this hearing, when you adopt your resolution, it includes the Amenity Policies, the progressive discipline and the fee schedule.

Mr. Roumy: The fee schedule according to my proposal.

Ms. Adams: Is this a new proposal?

Mr. Roumy: Yes. When I add the two columns at the end, just for the record, for the last 10 years, we haven't had an increase for the tennis membership. So, I came up with the plan here, if I say to myself, for 10 years with old fee, what would be a 3% increase every year over 10 years.

Ms. Adams: Why don't you walk the Board through this chart and how it's different from the chart that's in the agenda packet.

Mr. Roumy: It's the same chart.

Ms. Adams: In your agenda packet, there is a worksheet that starts with Fiscal Year 2022, using the rates that you suggested and then a 3% increase each year. That's just an example of what it will look like. If next year the Board wanted to increase 1%, you could or 10 percent, you could as long as it's within the threshold that you adopt today. It's setting your cap on your fees.

Ms. Chichelli: So, this is the advertised fee and this is the current fee.

Mr. Roumy: Correct. What I did is, you have two columns at the end. If I take the old fee and I compound 3% interest 10 years ago to today, it is still higher than what we proposed. So, 3% percent is \$175 for three months and we are proposing \$165. For \$350 for six months, we are proposing \$320. \$538 will be compounded interest or compounded 3% every year for the last 10 years. We are at \$640. The way I did it is how much it costs to play. With the old system that we have, let's say three months membership for single membership, is \$4.81 to play. If you go to the family membership for three months, a family of two costs \$3.33 to play. That's very, very low. No wonder people are coming here just to play because it's almost free. So, if you look at the

three month membership for two players, it comes down to \$1.65 for each member of the family to play here.

Ms. Adams: Yeah. I think we've just asked this before. The reason we are increasing the fees is because of the feedback from you and other Board Members. So just some background, there was a discussion from you. There were presentations from you. Also, the Amenity Manager checked with other tennis programs and we were certainly the lowest option in this region as far as the tennis program. Right now, the question is, is the Board ready to adopt the resolution and would you like to establish the fees at the advertised rate? Then we can confirm the fee schedule that you want to implement for Fiscal Year 2022. Is that in accordance with the suggestions from Supervisor Roumy, which are reflected on your tennis fee budget worksheet in Column 1 under Fiscal Year 2022. So, in your agenda packet, the very last page shows take Supervisor Roumy's suggestions which were very logical and based on his years of experience in the tennis programs and knowing the current market. Do you want to adopt the resolution with the advertised fees and then furthermore direct staff to establish the tennis fee schedule for Fiscal Year 2022 in accordance with the tennis fees budget worksheet?

Mr. Szewczyk: I don't have a problem with that as long as I can look at what Bill just gave us and make sure that it jives with that first column on the tennis fee budget worksheet. So, looking at number one, the proposed new fee for single one month is \$75. That matches up. For three months, the proposed fee is \$165, but on the tennis fee budget worksheet it is \$185. I don't have a problem with potentially charging what Bill is recommending. I want to make sure that what he's recommending is not going to be above the advertised fee. Just as long as it's less than the advertised fee, we can do what we want with those numbers.

Ms. Adams: Yeah. These numbers are different than the numbers that Supervisor Roumy provided earlier this calendar year. I used the numbers that he had previously provided. I see that these are different than what we had previously provided. Your next meeting is in October, so it would be best if we could hammer this out tonight so that we have an understanding if somebody wants to become a tennis member in the new fiscal year.

Mr. Szewczyk: Alternatively, the new prices could go into effect November 1st. That's not a significant issue. If the Board is ready to approve the resolution with the Amenity Policies as presented and with the advertised costs being the amount that's adopted, the Board has

discretion each year to charge that amount or less based on the budgeting process and what's presented to the Board for approval.

Mr. Szewczyk: Okay. So if we pass this resolution, what I'm saying is, are we going to implement Bill's proposed fees?

Ms. Adams: I think that's the direction the Board is going, but I suggest we take that in a separate action. First, we do the resolution with the Amenity Policies and advertised fee cap.

Mr. Szewczyk: Okay.

Ms. Adams: Then we look at specifically for this fiscal year, where we want to be with tennis fees?

Mr. Szewczyk: I just don't want to have to go through another advertisement.

Ms. Adams: We don't. If the Board is comfortable with the Amenity Policies and the advertised rates, that does not tie your hands in any way. It gives you flexibility to set the fees where you want them to be. Then the Board would be ready to make a motion to adopt Resolution 2021-07.

Mr. Sabol: Keep in mind what's going to happen here, because inflation is killing us right now, Social Security already told us 6% to 7%. So, we just want the opportunity to change the figures, just like we're speaking because they are going to change radically.

Ms. Adams: Yeah. You're right that the inflationary index may go up more than 3%. I think the average for the past 10 years has been 2.5%, but we're looking at potentially higher inflation.

Mr. Sabol: The point is, as Joe mentioned, we just want to adapt ourselves.

Ms. Adams: Yes. So, Supervisor Szewczyk, if you look back to the advertised fees, you'll see that the cap is set fairly high. That was set intentionally high in order to give the Board flexibility to adopt what you want tonight and to move forward. You'll have the most flexibility by adopting these advertised fees and then by establishing the fees in accordance with your budget planning every year. So, when we present the Proposed Budget, we'll also present a proposed fee schedule that would be in accordance with the resolution that you adopted. Does that make sense?

Mr. Szewczyk: Yeah. I just don't want to go through the motions here and have these fees not put into affect as soon as we can.

Ms. Adams: No. We are going to make it separate. So, after the resolution is adopted, I want to circle back and address the fees for this year so that staff has direction from the Board on the tennis fees for this current fiscal year.

On MOTION by Mr. Szewczyk seconded by Mr. Chichelli with all in favor Resolution 2021-07 Amending Amenity Facilities Policies, Rates, Deposits and Fees was adopted.

Ms. Adams: Board Members, moving back to the tennis fee budget worksheet, would the Board Members like to hammer this out at this meeting or would you like for me to confer with Supervisor Roumy and bring back a tennis fee budget worksheet next month based on his revised recommendations? It's up to the Board.

Mr. Szewczyk: Let's do it right now.

Mr. Roumy: If we wait to October, it's going to be too late. People are coming.

Ms. Adams: So, I think we are in agreement that the one month for single would be \$75 for the fiscal year. Would the Board like to make the three month for single \$165, which is Bill's recommendation on the new sheet that he distributed tonight?

Mr. Szewczyk: Yes, that's fine.

Ms. Adams: Okay. We'll make that \$165. Would the Board Members like to make the six month for a single \$320, which would be consistent with Supervisor Roumy's recommendation tonight?

Mr. Szewczyk: That's six months?

Mr. Roumy: Yeah.

Mr. Szewczyk: Six months single, current \$260. Okay.

Ms. Adams: Alright. Then there is the 12 month singles \$640, which is consistent with earlier recommendations.

Ms. Benjamin: Can you say that again. I wasn't following.

Ms. Adams: Yes. The proposed fee for the fiscal year starting October 1 for 12 month single would be \$640. That is the number that's noted in the worksheet that's in the agenda packet, Supervisor Benjamin. It also is consistent with the handout that Supervisor Roumy provided for tonight. So, I think we're in agreement there. Then the daily fee is \$10.

Mr. Roumy: Yes.

Mr. Szewczyk: Yes.

Ms. Adams: The family fee for one month is \$150.

Mr. Roumy: Yes.

Ms. Adams: The 3-month family fee is \$315.

Mr. Szewczyk: Okay.

Ms. Chichelli: Yes.

Ms. Adams: The 6 month family fee is \$630

Mr. Roumy: Yes.

Ms. Chichelli: Yes.

Ms. Adams: And the 12 month family fee is \$1,200.

Ms. Chichelli: Yes.

Mr. Roumy: Yes.

Mr. Szewczyk: Yes.

Ms. Adams: So, these prices will go into effect on October 1, 2022 in accordance with your budget cycle. Then when we work on our Proposed Budget next year, we'll come back with proposed tennis fees for your next year. How does that sound?

Mr. Szewczyk: Good

Ms. Adams: Alright. Can we just memorialize the Fiscal Year 2022 tennis fees that will be charged to residents in accordance with the numbers that the Board just approved? We just need a motion.

Mr. Roumy: Don't charge residents.

Ms. Adams: Is that a motion Supervisor Roumy?

Mr. Roumy: I said we don't charge the residents for tennis.

Ms. Adams: I'm sorry. Yes. So any tennis members, anyone who inquires about tennis memberships, these would be the new fees that are communicated to them.

Mr. Roumy: Yes.

Ms. Adams: So, we need a motion to approve the fee schedule as presented.

On MOTION by Ms. Chichelli seconded by Mr. Sabol with all in favor the fee schedule as presented was approved.

Ms. Adams: Board Members, that was a long time coming. That's been a topic of discussion quite a few times. We need a motion to close the public hearing.

On MOTION by Mr. Szewczyk seconded by Mr. Sabol with all in favor the public hearing on the Amended and Restated Amenity Facilities Policies and Amended Amenities Rates, Deposits and Fees was closed.

B. Consideration of Proposals for Fountain/Aerator Installation

- i. Aquagenix**
- ii. SOLitude**
- iii. Preventative Maintenance**

Ms. Adams: Our District engineer have been working with two different service providers who are capable of installing fountains or aerators. The pond map that you have before you will be helpful to confirm the locations that are proposed. Mr. Chairman, did you want to make any remarks before Brent presents the proposals to the Board Members? These were earlier reviewed by the Board and the Board wanted more information in terms of what it would cost to maintain the fountains as well as what it would cost in terms of the electrical requirements, the installation and the electrical. So, SOLitude is the low bidder. We can just focus on those proposals.

Mr. Szewczyk: Yeah let's start off with SOLitude.

Mr. Roumy: Can I say something?

Mr. Szewczyk: Yeah.

Mr. Roumy: Whoever handled this project did not give directions to the vendors. SOLitude is proposing Ponds 14, 4 and 10. Aquagenix suggest unknown ponds that have no numbers on it; Ponds 3 and 10. They are all over the place. Now, you can quote me if I'm wrong, but pond aeration is not just for the look that you're going to have a fountain or they call them diffusers. Lakeside Plantation ponds are over 20 years old, correct me if I'm wrong. They are over 20 years old, mainly from stormwater. Since the ponds are not aerated, it means change of water under the surface or bringing water from below to above, where you will experience muck accumulation from leaves, grass clippings, fish waste and other organic matter. True or false if it's not aerated?

Mr. Burford: Correct. It will help break the material down better.

Mr. Roumy: This muck causes excessive weed and algae growth. That's according to the vendors.

Mr. Burford: Correct.

Mr. Roumy: Treating with chemicals leads to an acceleration of muck from algae and weeds. Because you kill the weeds, they drop down and all of a sudden in a few years, I believe that the muck will be high enough that it will displace the water. So, the lakes or the ponds would be smaller. They will not take so much water anymore because there is a lot of muck in the water. So, if people think it's just for visual, I know it's very expensive, but sooner or later we have to do something with these ponds. Either we have to do some dredging to clean up the bottom of the ponds, which will be expensive or we do some aeration. What are the benefits of aeration of the ponds either by fountains or by diffuser under the water? It will circulate and oxygenate the water and create a healthy environment for the lakes. It will reduce the chemical use every month when they come in to kill the algae. It creates a clear, clean lake with less bottom muck. It will prevent stagnant water, reduce fly and mosquito population because the water is sitting there doing nothing. It will accelerate the decomposition of organic matter, but since you are circulating that water, organic matter will not accumulate. It will enhance the pond's natural color and beauty. Also, if there are any noxious fumes or noxious odors, it will be eliminated. So, SOLitude includes Pond 14. They are going to use five air diffusers. Right? They are also going to use one unit, which is the AIRMAX. Aquagenix will use two AIRMAX with 12 air diffusers, but I don't know which lake to be honest with you. One is \$10,000 and the other one is \$19,000. For Pond 4, they suggested a fountain. It's a five-horsepower, with six LED lights that can change color and how the fountain sprays the water out. Aquagenix went to Pond 3 instead of Pond 4 like SOLitude with five horsepower with six LED lights for \$19,000. Then they went to Pond 10 where one fountain is \$7,500 and the other one is \$11,000. We have to get permits. They have to supply power within 30 feet of the compressors or the generator or the unit itself. We have to pay for fuel surcharge. I didn't know that. So, according to the bids, let's say the gas was \$2 last year and it's \$3.50 this year, they are going to charge us with the difference for the fuel surcharge between last year and this year. Any unforeseen issues, such as dredging or cutting, or doing anything else, we have to pay for. The maintenance service is \$1,160 a year. It's a good idea, but it's expensive. For the people who thinks it's only just for show, it's not only for show. It's to generate oxygenated air into the water and make these lakes or ponds healthier. I know it's a lot of money. One is \$3,000 and the other one is \$50,000. SOLitude is \$3,000. If he's

using Pond 14 for five air diffusers, I don't think that's enough. I think he has to go like the other guy with 12 air diffusers. So the pond will be in better shape.

Mr. Sabol: No. Let me explain something to the general audience because they don't really understand what happened here. Several years ago, we had what had they call midge flies and they come back every year. The midge flies go through the whole complex and they are miserable. So, the idea was to put aeration in the ponds so that would have air through them and that would decrease the larvae of the midge fly and that would solve that problem. That was when we started talking about this. I know it's a great expense. That's what brought the subject about when we started. Now, when we put aerators in the ponds itself, all you see is the bubbling effect. That's different. It does much more good to add air to those ponds, which takes care of the midge fly problem. It makes a better aquatic situation for fish and everything. It adds an aesthetic view, which is really nice. If you want to really look at it, it does add to the community. It does add to the price of your house. It just makes everything nicer, but the water that goes straight up in the air does not do quite as well as the aerators. The ones in the water do much better job. The other two that we are speaking about will help, but they would not have the same effect as the other aerators in the water.

Mr. Szewczyk: Here's my concern. I personally would like to shelve this, simply because of the questions regarding the numbering of our ponds. Okay? All of these companies need to be talking about the same numbers on the same ponds because they're coming up with numbers based on certain ponds. So I don't feel comfortable with Pond 14 and then pond question mark and Pond 4 and Pond 3 being aligned. Well, all of the companies have been talking about the same numbers assigned to the same ponds to make sure the square footage, everything regarding what we will need in order to do the proper job in those ponds. So, it would be my recommendation that we direct the engineer to get together with the companies and clean up the proposals regarding the numbers because they might change if the company was looking at a pond other than the one they were supposed to. I thought we were only doing Ponds 3 and 10 as a start. That's my recommendation at this point.

Ms. Adams: There have been several times that the fountain proposals have been before the Board and one of the first times they were put forward, was when there was discussion regarding the benefits of fountains. There was a suggestion from Board Members that maybe one of the ponds that had midge problems in the past would benefit from an aerator. So, that's why

that was added. There were two ponds under consideration for fountains and one pond that was under consideration for an aerator because of the history of midge management issues in that location.

Mr. Szewczyk: I thought that the pond in question was T-bone, which is Pond 11 . That's the one most of the neighbors complained about the midge flies. So, again, the numbers aren't matching up. I want to stop this right now, clean it up and bring it back.

Ms. Adams: Sounds good.

Mr. Roumy: We have to compare apples-to-apples.

Mr. Szewczyk: Exactly.

Mr. Sabol: When this all started, we talked about it and we were joking about it. That's not why. The reason we put it there and we are talking about it is to locate it where it will do the most good if we put a bubbler in that particular pond. I just want to clarify it because Joe was correct. I think our numbers don't jive with what we're talking about here. If it was me, I would have look at the whole thing again and come back with different options.

Mr. Burford: That's not a problem. They are all talking about the same lakes. They are comparing apples-to-apples, but we can clean it up. T-Bone lake, Lake 11 was Pond 14 on a different map. That's why we want to try to work out the map.

Mr. Szewczyk: This can be our working document from now on.

Mr. Burford: From now on moving forward. We have some questions on Lake 11 where they are showing a proposed electrical location. The District really doesn't have access from that point. I want to propose another location for an electrical connection, so I will get back with them and get it all cleaned up with the same number system and move forward.

Mr. Szewczyk: Okay.

Mr. Burford: My understanding when it first came up, there were two fountains that were proposed, one for Lake 3 and the other for Lake 10. Then in the past meeting, they mentioned about the midge flies and possibly trying aeration on Lake 11, the T-bone lake. That's where it came about. Now the fountains again and the gentleman that spoke to the Board from SOLitude, do not provide oxygenation of the water. The fountains are basically for aesthetics, for a nice view with the colored lights. They do provide some white noise like we discussed previously that blocks out some of the noise of the pool pumps, air conditioner and things like that. As far as aerating the water, dealing with midge flies and keeping the water turned over, so you don't have

the separation of the water. That's when you get to the aeration systems. I'll get back to the vendors and get it all cleaned up.

Mr. Roumy: Should we decide which pond we want to put the diffuser in?

Mr. Szewczyk: Originally we were looking at the most publicly viewed ponds.

Mr. Roumy: Forget about the fountains because they're noisy, number one. Number two, people who sit out in my backyard.

Mr. Szewczyk: I would be glad to volunteer to have them put a fountain on Lake 9.

Ms. Adams: The fountain discussion came up for aesthetics and for general community enjoyment, but if the Board wants to no longer continue to consider that, that's fine. If you only want to consider aerators, that's fine. I think we need explicit direction for the District Engineer if you want to not see proposals for fountains, but to see proposals for aerators and on what ponds you wish to do so.

Mr. Roumy: We need the most effective system for our ponds. So, if the diffusers are the way to go, then we get the diffusers.

Mr. Burford: Based on the discussion at the meetings, I was under the impression that Lake 11 was the only lake that really had the issue that midge flies and that was one of the reasons they wanted to try that.

Mr. Szewczyk: You're right. That is the lake where there had been traditionally the most complaints from midge flies. You're never going to eliminate midge flies.

Ms. Adams: Right.

Mr. Szewczyk: But we threw like 500 fish in there, 5 or 8 years ago.

Ms. Adams: Yeah.

Mr. Szewczyk: Honestly, it hasn't been as bad as it used to be.

Ms. Adams: I'm sorry, Brent. Just for my confirmation can you please identify with the correct numbering system the two ponds that were under consideration for fountains? Would that be Lake 10?

Mr. Burford: And Lake 3.

Ms. Adams: Lake 3. Okay. So, this is really just an item where the Board can provide direction to the District Engineer. Do you only want to see a proposal for an aerator for Pond 11 as a means of addressing any midge issues or do you want to table the whole concept?

Mr. Szewczyk: No, I mean. We're so far into it that at least we'll have all the information we need when and if we're going to act on it. I personally would still like to see the fountain proposals for Lakes 3 and 10, but diffuser proposals for Lakes 3, 10, and 11.

Mr. Roumy: Can I suggest something? Can Brent bring the vendors here, take a walk through the lakes and let them tell us which one would requires a diffuser? They have more knowledge than we do.

Ms. Adams: Supervisor Roumy, SOLitude is the group that came and did a presentation for the Board. They are the ones that do the current aquatic maintenance, so they are very familiar with the ponds here in the community.

Mr. Roumy: So, they suggest only three ponds?

Mr. Szewczyk: No. We did that just as a starting point.

Ms. Adams: In terms of aesthetics and visibility.

Mr. Sabol: We may continue or the Board may continue at a later time to maybe include three, four and five ponds, maybe all the ponds if it works out. We don't know that. I think there are two ways to look at it. I look at it because I'm looking at the values of homes too. When I come in here and I see the water going 20 feet in the air, if it is a nice color, I sit out here at the pool and I see over there is a pond there is a nice color. People enjoy that, but the gentleman from SOLitude explained to us that they don't do quite a good job with aesthetics. I realize that, but I think overall, it would be a good idea.

Mr. Burford: I think that they provide a service. They can come out and assess your lakes and make recommendations. I think he even brought it up at one of the meetings. There is a fee associated with it.

Mr. Roumy: If you have 10 ponds, they will come here and evaluate the 10 ponds. They will say, "This pond needs one aerator, this pond needs three aerators and this pond needs four diffusers." Then we make a decision on which pond we want depending on the price.

Ms. Adams: Would Board Members like to see a proposal for the services that SOLitude providers related to assessment of the ponds?

Mr. Roumy: The size of the ponds, the benefits to pond versus other ponds and then we decide which pond we want to install this diffuser. Not by us picking the pond and then the pond meets more than this one.

Mr. Szewczyk: I would tend to agree with you. If we add an overall assessment, because if we are looking at a fountain versus an aerator, they might base on their recommendation and say, "Okay, this is already well aerated and having an aesthetic fountain here, would be okay, versus this lake, which needs aeration."

Mr. Roumy: Exactly right. So we need a study on all the lakes on which lakes need what. Then we make a decision on which lake needs what.

Mr. Szewczyk: Or if they need anything.

Mr. Roumy: Exactly.

Mr. Szewczyk: Then it becomes a case of that its aesthetics or nothing. Okay? So yeah, I'd like to direct staff.

Ms. Adams: Staff to reach out to SOLitude to get a proposal for an assessment of the pond in terms of aquatics.

Mr. Roumy: Maybe one pond has 2 feet of water and the other pond has 7 feet of water. So, he cannot put anything on the 2 feet of water pond, compared to the 10 feet of water pond. That's my suggestion.

Mr. Szewczyk: Okay. I like that.

Ms. Adams: Alright. Looking at the remainder of the agenda, I don't think that there's anything else related to District engineering, but let me take a peek of the Action Item List and confirm that. Mr. Chairman, would you like for the District Engineer to wrap up unless there are any other questions from Board Members?

Mr. Szewczyk: Yes.

Ms. Adams: Alright. Thank you, Brent.

Mr. Roumy: Thank you, Brent.

Mr. Szewczyk: Brent thank you very much.

Mr. Burford: Have good evening.

Mr. Burford left the meeting.

Ms. Adams: Mr. Chairman, would you be okay if we call a five-minute recess?

Mr. Szewczyk: Absolutely.

Ms. Adams: I appreciate that. Thank you so much. We are going to take a 5-minute recess and we'll reconvene the meeting at 7:48 p.m. Thank you

The meeting was recessed at 7:43 p.m.

The meeting was reconvened at 7:48 p.m.

Ms. Adams: Mr. Chairman, we have a vendor here who is waiting for a proposal to be presented. Would you like for us to take this item now and then go back to the regular agenda?

Mr. Szewczyk: Yes.

- **Approval of Exterior Fan Purchase (Added)**

Ms. Adams: As Board Members are aware, you recently approved a capital project. In the course of replacing the soffit, it was identified that the District would benefit from additional lighting. That has been approved. Also, another consideration would be if the District wants to consider the installation of fans. We would just be expanding that capital project. The vendor estimates that the cost would be somewhere around \$3,000 to \$5,000 for quality outdoor commercial fans. So, this would be an item for Board consideration. If the Board wants to approve the addition of the fans in the outdoor area, we would just need for the Board take action on that matter. Mr. Chairman, since this item was not specifically added to the agenda seven days in advance of the meeting and published on the website, we would be required to take public comment on this matter.

Mr. Szewczyk: Okay.

Ms. Adams: Would you like for public comment to come first or for the vendor to provide any information to Board Members regarding the proposed locations or would you like to present the item? How would you like to proceed?

Mr. Szewczyk: I would like to open it up for discussion from the public first.

Ms. Adams: Alright. Members of the public, is there anyone who would like to make a comment or statement to the Board regarding the installation of fans in exterior areas?

Resident (Donna Keller, Savannah Drive): I was one of the people who suggested new fans out there because there is frequently a group of people who sit in the front and back, to try to get away from the pool, we thought having two ceiling fans in the front on each side and two ceiling fans in the back one on each side would be helpful to provide a breeze to the people.

Ms. Adams: Thank you. Are there any other public comments regarding the installation of fans?

Resident (Sue Martin, Scarlet Avenue): I agree. I think the fans are a wonderful idea, especially out back when people are here enjoying watching the swimmers. It's always very

warm out there. Last year during COVID, our ECC Committee had to meet out on the patio and it was extremely warm. So, I think fans would be a wonderful idea. Thank you.

Ms. Adams: Are there any other public comments regarding the proposed installation of fans in exterior areas? Hearing none, Mr. Chairman, this is ready for discussion or presentation from the vendor.

Mr. Roumy: Joe, how many fans will we be getting?

Mr. Szewczyk: Let me go through the whole thing before I answer your questions. I discussed with amenity management months ago about the idea of putting fans in the front and back. This is the perfect opportunity, while the ceilings are out, to take care of wiring and boxes and things like that. Justin from Innotech that is doing the work is here, so Justin, if I give a wrong number, just shout out.

Mr. Jackson: Yes, sir.

Mr. Szewczyk: Okay. My recommendation was for four in the front and five in the back. Okay? Well most of the front, but especially in the back because people are sitting against the building pretty much all the way down. The reason I said four in the front, we wouldn't put one directly above the entrance, so there would be two on each side and then five evenly spaced in the back. Now, I gave to the Board some options of fans. That doesn't necessarily have to be those exact ones, but for me to get a ballpark figure here. Justin said to wire up and box and put a 20-amp breaker in was about \$3,000. Okay? The cost of the fans for him to actually put them together and install them, was all part of the \$3,000. Was that it, Justin?

Mr. Jackson: No. The fans are an additional cost of about \$1,100.

Mr. Szewczyk: Okay.

Mr. Jackson: For a quality outdoor fans.

Mr. Szewczyk: But that's for just the installation; putting them together, and putting them up?

Mr. Jackson: The wiring and the boxes. The amount would have to go up if the ceiling is complete because obviously there's access to the wires because the ceiling's down. So, it's just a common sense thing to do it now. Yes, those numbers are correct.

Mr. Szewczyk: Alright. I'm saying that based on the little bit of research that I did, we can probably get outdoor damp rated fans for about \$250. There's a lot better, but we also want

to make sure that we have proper air flow and Cubic Feet per Minute (CFS). Okay? So on the first page, we have a fan for \$130, but the problem is that only had a CFM of 2982.

Mr. Roumy: What size?

Mr. Szewczyk: We are dealing with fans anywhere from 52 to 60 inches, but the CFM's on that one was only 2982. It was recommended to me through some people in the construction field, that the CFM should be up around 5000. Then moving on to number 2, which is the Altura. The Altura is a 60-inch fan that had a CFM of 6223, but that price was \$234. Again, these are just examples. What I'm after tonight is approval for Justin to go ahead and get the wiring done and the boxes up. We can still go back and forth regarding the aesthetics of the fan and the exact fans, but getting all of that background work done is what is most important because he's got to put the ceiling back together.

Ms. Adams: Yeah. Board Members, you may want to consider approving and not-to-exceed. That would provide for an allowance for the purchase of the fans as well.

Mr. Szewczyk: That's what I'm hoping for. The third one was a Murray Hill Outdoor fan. The CFM is 5306. That one was \$219. So, that's why I'm recommending \$250. The reason I had so many options was basically because depending on who you go to, they might not have nine of the ones we want, so we might have to go to option number 2, or something like that because I can't see having different fans in the front and the back.

Mr. Jackson: Right.

Mr. Roumy: There are no lights?

Mr. Szewczyk: No. That's why we stopped at 60 inches to make sure that the fan blade would not enter under a light and give that strobe effect. We can still work with Justin to make sure that they're properly placed. One of the problems I dealt with, was so many of the fans had lights. We don't need the lights.

Mr. Roumy: So how they're going to operate? Who's going to operate them? Is it going to be on a timer?

Mr. Szewczyk: No. It's going to be operated by the people in the office.

Mr. Roumy: So if the lady leaves at 10:00 p.m. and forgets to switch off these fans, they will be running all night long. My suggestion is to put them on a timer from 9:00 a.m. to 9:00 p.m. Could it be done?

Mr. Jackson: Yes, sir.

Mr. Szewczyk: Okay.

Mr. Roumy: Instead of running all night long?

Mr. Szewczyk: You wouldn't need that aspect of it for the work you're doing upstairs?

Mr. Jackson: We need approval to be able to get started on the wiring while it's exposed. Whatever fans you decide to put in, doesn't affect the price. If you want to add a timer to it, it's very easy to do. We can take care of it.

Mr. Szewczyk: Okay. Does anybody else have any other comments?

Ms. Chichelli: No.

Mr. Szewczyk: Do you think it's a good idea?

Mr. Sabol: I think it's a wonderful idea.

Ms. Chichelli: Yes.

Mr. Szewczyk: Justin, just so I get this right, when I make my motion, we are looking for you to wire it, get the boxes in with a 20-amp breaker, put the fans together and install them.

Mr. Jackson: Yes, sir.

Mr. Szewczyk: We are responsible for the purchase of the fans.

Mr. Jackson: Correct.

Mr. Szewczyk: All of that work, your number was?

Mr. Jackson: \$3,000.

Mr. Roumy: The timer is how much?

Ms. Adams: The timer will be just a small discrete amount.

Mr. Jackson: We'll add the timer at no additional cost.

Ms. Adams: Thank you, Justin.

Mr. Szewczyk: So, I would like for Innotech to go ahead with the installation of the boxes, the wiring and the 20 amp breaker, in preparation of the installation of nine fans.

Ms. Adams: What do you want the not-to- exceed amount to be with the inclusion of the materials? You want to give yourself enough wiggle room.

Mr. Szewczyk: Including the cost of the fans?

Ms. Adams: Yeah. Let's do that now.

Mr. Szewczyk: Let's say \$2,500, on the fans because it's \$250 times nine plus taxes and a little leeway.

Ms. Adams: We're tax exempt.

Mr. Szewczyk: Just in case we have to go up to \$270.

Ms. Adams: I agree.

Mr. Szewczyk: Alright. So I approve a not-to-exceed of \$5,500.

Ms. Adams: That's good.

Mr. Szewczyk MOVED to approve the proposal from Innotech to install boxes, wiring and a 20 amp breaker in preparation of the installation of nine exterior fans in a not-to-exceed amount of \$5,500 and Ms. Chichelli seconded the motion.

Ms. Adams: Is there any other discussion?

Mr. Roumy: Yes. Three blades are better than five blades.

Mr. Szewczyk: I personally think that the three-blade looks better than the five blade, anyway.

Mr. Roumy: It's more efficient.

Mr. Szewczyk: That's the route I would be going in. I'm looking for a three-blade fan. I'll be glad to work with amenity management to come up with those specific fans. My goal is for a three-blade, 56 inch, give or take with CFMs of around 5,000.

Ms. Chichelli: What color?

Mr. Szewczyk: I've been leaning toward brushed nickel or gray. I'd rather not have white because we are going to constantly be cleaning them.

Ms. Adams: Is there any further discussion?

Resident (Not Identified): Go with gray.

On VOICE VOTE with all in favor the proposal from Innotech to install boxes, wiring and a 20 amp breaker in preparation of the installation of nine exterior fans in a not-to-exceed amount of \$5,500 was approved.

Ms. Adams: Thank you, Justin.

Mr. Szewczyk: Thank you, Justin.

Ms. Adams: I appreciate you staying.

C. Discussion of Amenity Management Services

Ms. Adams: Board Members, as part of the preparation for the upcoming fiscal year, we worked with Vesta regarding proposed costs for the upcoming year. Those amounts were adopted into the budget when you approved the budget at last month's meeting. There was also confirmation from the Board that you would like to renew the Amenity Management Agreement; however, there have been some personnel changes with Vesta. Tamara, due to personal reasons has tendered her resignation with Vesta. As a result of that resignation, Vesta informed the District that they do not plan to continue Amenity Management Services here at this site. So, today, what we're looking at is a bid document in order to put out a Request for Proposal (RFP) for Amenity Management Services. Yesterday, Board Members received the document. My apologies. I think you received a 50-page document pretty late in the day. I have received some comments back regarding scrivener's error or other errors that need special attention. This RFP would also be subject to District Counsel review. The form of the agreement is an older form of the agreement. So, we will drop in a new form of the agreement, something that is more in keeping with the agreements that you see in 2021 from Ms. Sarah Sandy and her colleagues at Hopping, Green & Sams. This item is ready for Board discussion in terms of the content for the RFP. So, the timeline that we're working with: this is a time sensitive matter. We want to have an Amenity Management Company come in and provide Amenity Management Services here at this District. So, we would like to get a bid document out by the end of this week. That would allow for vendors to have time to review the project and provide a proposal before your October Board meeting. Your next meeting is scheduled on October 20th. That would mean that the proposal would need to be due a week before your meeting so that they could be included in the agenda packet. Then depending on the pleasure of the Board, any vendors who provide a proposal for Amenity Management Services could be asked to attend the meeting, if the Board wants to engage in a question and answer session, or ask questions of the vendor that would be appropriate to do at your October 20th meeting. The goal from there would be based on the selection that the Board makes for Amenity Management Services, to then move forward with an agreement and to get the new vendor onboard, hopefully around the November 1 timeline. That could be subject to change based on mutual agreement. It can also be phased in depending on the current situation.

Mr. Roumy: Normally the vendor would come here and make a presentation what they have to offer and how they're going to run this facility.

Ms. Adams: Yes.

Mr. Roumy: I think you are doing it in reverse. You are looking at the bid without looking at the vendor. The vendor should be here.

Ms. Adams: Normally the process is you put out a bid document. What's important is that the Board reviews the Scope of Services and the proposed hours of operation, so that we're looking for a scope that is in accordance with the service level that the Board wants to receive here at Lakeside Plantation. They then respond to the bid document and that could include presentations at your Board meeting, but they'll need to have some type of bid document which provides guidance on the service levels and the expected staffing levels, the positions and the tasks that will be assigned to the various positions.

Mr. Roumy: In the past, they used to come here, make a presentation, we looked at different vendors at the time and then the Board decided on which presentation they liked.

Ms. Adams: Yes.

Mr. Szewczyk: We're still allowing for that.

Mr. Roumy: Okay, but what Tricia is saying is that, we need to get the bid document out. However, I am fully in favor of having everyone that is submitting a bid come and give a 10-minute presentation with a five-minute question and answer, so we can meet them, have an opportunity to question them and maybe even get audience members to submit questions ahead of time that we can then present.

Mr. Roumy: Why are we only going to have one vendor? We should have more than one.

Ms. Adams: We hope that we have more than one. We don't know how many vendors will respond to the RFP.

Mr. Roumy: Okay.

Ms. Adams: We'll put this out to vendors who are capable of providing Amenity Management Services and are asking them to bid on it. It's up to the vendor. They will decide if they want to bid or not. Part of the bid process is a presentation to the Board based on the feedback I'm getting now, at your October 20th meeting. So they will provide a proposal that the Board will review as part of your agenda packet and they could also be here. The Board selects which vendor you want to come in and provide Amenity Management Services.

Mr. Roumy: Okay.

Ms. Adams: Their proposal will include a narrative regarding their approach to amenity management, staffing plan, costs, other important information that the Board will want to consider as part of this process.

Mr. Roumy: So according to Joe, we're going to announce it so if the members have any questions.

Mr. Szewczyk: I would want the public to submit their questions in advance so that either we can read them or consolidate them, just from a time standpoint. That's why I just threw out there, a 10-minute presentation and five-minutes to take questions. It depends on the number of bidders we have.

Mr. Roumy: So, who is going to take the lead to send the notice to all of the residents?

Ms. Adams: I can work on that with the Chairman. I think what's critical tonight, is that ultimately we want for the Board to approve the substantial form of the bid document so that staff can continue to refine it. District Counsel can provide input and then delegate authority to the Chairman to approve the final form, so that we can get this out to vendors who provide amenity management.

Mr. Roumy: Okay.

Mr. Smith: Just real quick, the process that Tricia is laying out is a very typical process in the industry. So, the vendors should all be very comfortable with it.

Mr. Roumy: Thank you, Scott.

Mr. Sabol: What possibly could happen here, is just like we spoke about before. Vesta been for several years. We've paid approximately \$15,000 to Vesta for years, but we may get somebody that wants \$20,000. So, then we have to consider raising rates. It could amount to a great thing or it will be the same, we don't know that.

Ms. Adams: Correct. There could be an impact to the budget and we'll be prepared. Should the proposals come in, we'll have an understanding of the cost and we can have a frank discussion as it impacts the budget between the Board and staff at next month's meeting.

Mr. Szewczyk: Especially when it comes to any projects that might be coming out of the Reserve Study. Things like that. Things will have to be adjusted. Now, personally, I didn't have real big problem. I emailed you with my comments.

Ms. Adams: Yes. I received comments, which were good comments. I also received a few other comments as it relates to current staff managing the sidewalk maintenance program. We want to add that in, that's an important aspect of the amenity management. I'll also say that in an ideal world, we want the bid documents to be 100% perfect and to cover every aspect of what we want. However, even with an agreement, the Board has the ability to change agreements in the future, to make revisions if there's something that is not addressed on the forefront. I'm not expecting a lot of that because we're using a bid document that has been vetted with other Districts and is a comprehensive document, but we do want to just put that forward, that there's nothing that is set in stone. The District does have the ability to cancel agreements and to make agreement revisions.

Mr. Szewczyk: As I said, I'm okay with the guts of what we have out there.

Ms. Adams: Yeah.

Mr. Szewczyk: Do we need a motion?

Ms. Adams: We would be looking for a motion to approve the RFP for amenity management in substantial form and delegating authority to the chair to approve the final form.

On MOTION by Mr. Szewczyk seconded by Mr. Sabol with all in favor approving a Request for Proposal for amenity management in substantial form and delegating authority to the Chairman to approve the final form was approved.

Ms. Adams: So, that bid document will go out and hope to have multiple responses for the Board to consider at the October meeting and be able to move forward.

D. Consideration of Fourth Addendum to Agreement with Bloomings Landscape and Turf Management, Inc.

Ms. Adams: This is a simple renewal of the term. Your current service agreement with Bloomings expires on September 30th. This would extend that term by another year. There was discussion last month regarding the performance of the vendor and the fact that the District has the ability to cancel the agreement with 30 days notice. Supervisor Chichelli has been working with the vendor regarding landscape review meetings and identifying areas that need to have improvement. So, that matter is ongoing. The 12 month agreement renewal also includes the new language related to the E-Verify program and this is language that's been added to the agreement

addendum to ensure the vendor is in compliance with that new Florida Statute. Ms. Sarah Sandy is on the line. Sarah, did you have any comments regarding the agreement renewal? It was her office that prepared the document.

Ms. Sandy: Yeah, that covers it. Thank you.

Ms. Adams: So, we would be looking for a motion to approve the Fourth Addendum to Agreement with Bloomings Landscape and Turf Management, Inc.

Mr. Szewczyk MOVED to approve the Fourth Addendum to Agreement with Bloomings Landscape and Turf Management, Inc. and Ms. Chichelli seconded the motion.

Ms. Adams: Is there any further discussion?

Mr. Burford: Are we happy with Bloomings service?

Ms. Chichelli: We are trying to work with them.

Mr. Roumy: I'm just asking.

Mr. Sabol: The only portion that I'm not happy with Bloomings is something that's in their contract. We trim around the pool and that contract calls for two trimmings of the trees. I would like for you to look into that. There should be three trimmings around pool.

Ms. Chichelli: We need to check that.

Mr. Sabol: Okay. Outside of that, Bloomings is okay, I think.

Mr. Szewczyk: Remembering that there is a 30 day out clause?

Ms. Adams: Yes. The District has the ability to cancel.

Mr. Szewczyk: If we become dissatisfied. So, I feel that we need to renew at this point and then just play it by ear, would be my comment.

Mr. Sabol: That would be my comment too.

Ms. Adams: Understood.

Mr. Sabol: Because what happens, just like in the HOA way, we've changed companies two or three times already. When you start chopping, chopping and chopping, sometimes you don't get satisfaction. So, I'm satisfied with them. There are some things that they could stand a little bit of improvement, but it could be done just by discussion too.

On VOICE VOTE with all in favor the Fourth Addendum to the Agreement with Bloomings Landscape and Turf Management, Inc. was approved.

SEVENTH ORDER OF BUSINESS

Business Administration

A. Approval of Minutes of August 18, 2021 Meeting

Ms. Adams: Included in your agenda packet Under Section 7, Tab A is a printout of your meeting minutes from last month. Are there any comments or input? Otherwise, staff would be seeking a motion to approve.

On MOTION by Mr. Szewczyk seconded by Ms. Chichelli with all in favor the Minutes of the August 18, 2021 Meetings were approved as presented.

B. Approval of Check Register

Ms. Adams: Before we discuss the Check Register, I will just make a follow-up note from an item that was brought up last month. There was some question regarding the cancellation of the Frontier data services, your internet cable services and the implementation of the new service provider. Those were canceled with Frontier on May 27th. At that time, they provided a confirmation number, and advised that it would take 90 days for them to refund that last billing cycle. So, staff is monitoring that. That is something that has not slipped through the cracks. So, I just wanted to let Board Members know that. Included in your agenda packet in Section 7, Tab B is your Check Register.

Mr. Szewczyk: We had a similar situation with the Kings III emergency phone, right?

Ms. Adams: Yeah. With Kings III, I believe there was a motion back in the summer months, to cancel the Kings III service. So, at the direction of the Board, a letter was prepared and sent to the vendor. We have to cancel in accordance with the current agreement and it required a specific notice that ran with a certain timeline. I believe the date was some date in December that it would be canceled. So, we do need to continue that service. They've been notified, it's canceled, but the cancellation has to run in accordance with the current agreement.

Mr. Szewczyk: Kind of like it had to be done within 30 days of the renewal or something like that.

Ms. Adams: Exactly. It's one of those. Yes, sir. So, that notification has taken place and moving forward in your next calendar year, we will no longer be billed for that service. But it is part of your current billing.

Mr. Szewczyk: Okay. I had a question regarding Action Mail Services. Is that from the mailing of the resident letters?

Ms. Adams: Yes. The District is required in order to comply with Florida Statutes, when there is a proposed increase for the operations and maintenance (O&M) fee, that landowners are noticed via a mailed notice. So, that fee was the cost for that mailed notice for your increase in O&M fees.

Mr. Szewczyk: Okay. I have two other questions regarding bills. I'm looking at FPL, account number 4126-05586. We were billed \$414 this month, \$484 last month, but compared to \$141 for the same time period last year to this year, it was \$300 more. Now the only thing I could think of is we went through a period where the clubhouse was closed because of COVID. Would that make sense?

Ms. Adams: There are multiple FPL invoices in here. Did you already find the service location? I want to confirm which meter it serves?

Mr. Szewczyk: I got the meter number.

Ms. Adams: Let me do a little bit more research and find out if this is the meter that feeds the Clubhouse and just confirm. I don't recall the dates that the Clubhouse was closed or non-staffed due to the pandemic, but that could have been a factor. I do need a little bit more information about which location this is. Actually Tamara is on the line. Tamara, I don't know if you have a copy of the agenda packet in front of you or if you recognize the meter number, but please jump in if you do. Otherwise, we'll investigate and report back to the Board.

Ms. Lorf: I have the agenda packet in front of me, but I don't see where the FPL number is. What is the date ?

Ms. Adams: This is the one that was due on August 16th.

Ms. Lorf: Okay. I will get back to you.

Ms. Adams: Sounds good. So, Tamara and I will confer and we can report back to the Board at next month's meeting or email the Board Members in advance. If there is an issue that needs to be corrected, we can work on that.

Mr. Szewczyk: You might want to just take a look at the majority of the FPL bills because I have another one here where this month's bill was \$1,100, last month, which is great, but last year in the same time period, it was \$788. So, there was a \$400 jump. I can only assume that it was because we were closed and our power wasn't being used, etc., but if we can just confirm that.

Ms. Adams: What's funny is that last example that you're using, Supervisor Szewczyk, the account number ending in 67439, actually shows the kilowatts used. It's showing that there were fewer used a year ago for the period ending June 24th. If you look at the kilowatts, it was actually more used during that time period. So, I think this may relate to either increases in charges per kilowatt or something related to that. We will find out.

Mr. Szewczyk: Either way, it's something we need to know if we're getting charged more or was it due to the fact that the Clubhouse was closed?

Ms. Adams: It doesn't look like it's a consumption issue, but we will investigate further. Tamara spent some time identifying all of the meters and what areas they service for water and electric. So, those are helpful resources. We will make sure all of that information is updated and communicated more.

Mr. Szewczyk: The last one I had was for North Port Utilities. Why do we have a balanced forward of \$505 on the dumpster? Did we forget payments or do we have a dispute?

Ms. Adams: That would likely have been an accounting issue. I'll make sure that's been resolved. There is no dispute if the invoice was misdirected or for some other reason was not properly addressed. That could be the reason for the balance forward. Anything that was in error would be corrected by accounting.

Mr. Szewczyk: Okay. That's all I have.

Mr. Roumy: I have one for Sergeant's Electric for work on Pond 3 for \$8,667.

Ms. Adams: Was this for the vegetated median running down the Boulevard? Let me find out the invoice.

Mr. Roumy: There was also one for Pond 10 for \$5,800

Mr. Szewczyk: It sounds like the electrical for the fountains.

Mr. Lorf: Those were for the fountains.

Mr. Szewczyk: For the fountains that we were talking about putting in the ponds. That's a proposal for the electrical work.

Mr. Roumy: Oh, okay.

Ms. Adams: Board Members had asked to review the costs for the preventive maintenance and the electrical installation for fountains. That's an estimate. That is not part of your check run.

Mr. Roumy: It says it is a customer invoice.

Ms. Adams: They may be limited on the forms that they have and the office, but it is a proposal.

Mr. Roumy: So, this will go with the aeration.

Ms. Adams: The fountains, correct. So your Check Run Summary included in the agenda packet is for August 1st through August 31st in the total amount with the checks and the drafts was \$57,372.11. If there are no further questions, we will be asking for our motion to approve the Check Register.

On MOTION by Mr. Szewczyk seconded by Mr. Sabol with all in favor the August Check Register was approved.

C. Balance Sheet and Income Statement

Ms. Adams: The next item in your agenda packet is your unaudited monthly financials. This item does not require any Board action. This is provided for discussion purposes including your unaudited financials through the end of August. Page 2 shows your cash balance sheets for your General Fund as well as your Capital Projects Fund. It also has your Debt Service Fund related to your debt payments. In the revenue section we're running a little bit under budget as far as what the Board budgeted for the year. Your prorated budget for revenues would be \$720,298. There are some areas where we're not fully up to the prorated budget in regards to the tennis fees, activities and Clubhouse rentals. Much of that is related to COVID. Then in your administrative section, you're running a little bit under budget on expenses. Your prorated budget for the year is \$112,730 and your actual expenses are \$108,470. So, good job controlling expenses. Your operations are also running a little bit under budget and overall are in good condition. I will mention that in terms of your O&M assessments, District management and accounting staff have recently been in communication with the Sarasota County Tax Collectors Office. They've identified two parcels within the District, two commercial parcels that have not sold their tax certificate this year. So, the normal process is property owners have until a certain date to pay

their taxes. If those taxes are not paid, then in June the Tax Collector's Office sells these tax certificates, which are seen as an investment. Then eventually when the property sells and is settled and these tax certificates are satisfied. In the meantime, the District would be paid because the tax certificate is sold and then that money is transmitted to the District. However, there are two commercial parcels that the tax certificates did not sell this year and that's something that District management staff is investigating. We are going to get more details and present some information to the Board in an upcoming meeting. I don't have a lot more details right now, but I do want to make you aware of that issue.

Mr. Szewczyk: Just throwing this out, would there be any benefits to us as an entity purchasing those tax certificates?

Ms. Adams: No. I don't want to speak too much without looking at the actual numbers, but my first thought, is if the tax certificate did not sell, it's likely that the back taxes have exceeded the property value. So, it requires more investigation. District management staff will be conferring with District Counsel regarding future actions that the Board can take on this matter.

Mr. Szewczyk: Okay. I know it was just a crazy thought because we're short the money and then we will be laying out money to buy the tax certificate, but if there was some kind of benefit down the road.

Ms. Adams: I think likely there's a reason the tax certificate did not sell. So, we will investigate further and provide information to the Board at an upcoming meeting.

Mr. Szewczyk: Okay.

Ms. Adams: So, no action is required on the balance sheet and income statement, but I'm happy to answer any questions Board Members may have.

EIGHTH ORDER OF BUSINESS

General Audience Comments

Ms. Adams: We are down to the point in the agenda where we have another section of general audience comments. Mr. Chairman, would you like to take audience comments right now?

Mr. Szewczyk: Sure.

Ms. Adams: If there's anyone in the audience who would like to make a comment, please state your name and address for the record.

Resident (Donna Keller, Savannah Drive): I would like to address some things with the Clubhouse, specifically with the staffing. I've distributed an email that I sent to Tamara regarding an issue with the Clubhouse staffing. I have not received any acknowledgment of that email. It has not been acknowledged, it hasn't been addressed with anybody. I'm going to read it so that it goes into the record. *"Dear Tamara, I want to make you aware of an incident that occurred at the Clubhouse today involving Monica and Sheila, as well as myself. We went into the office to sign up for game night. They were inquiring if snacks were going to be served. She replied she wasn't sure what would be served but something would be. I said, 'Just so you know, not everyone can eat popcorn.' It was said not in a nasty way, at least not in my opinion. She became nasty and said that I always have to have a comment and she's sick of it. She became discourteous and belligerent, said 'I'm over it' and walked out of the office. When I went into the bathroom, she was in there complaining to someone about me, but I'm not positive who the person was that she was speaking to. I wanted to let you know I don't believe there is ever an excuse to speak to a residence in that manner and I think that you should talk to her. Sincerely, Donna Keller."* We've had new residents that have moved into the area and commented that staff are not very pleasant. I think that that's something that needs to be addressed because I've heard from several people who have just moved into the area. Thank you.

Mr. Sabol: Thank you.

Ms. Adams: Are there any other members of the public who would like to make a comment to the Board of Supervisors?

Resident (Mark Flynn, Scarlett Avenue): My questions were concerning the dog park and the parking, but since that seems to be gone, I didn't know anything about it until somebody told me. Why are we not being informed and if we are being informed, evidently I'm being left out? I don't know how that happens, but how are these proposed projects or whatever brought up being communicated to the residents and how do I go about making sure that I'm not let out again? That's my first question. While I was sitting here, they brought up fishing. I could care less who's fishing, but you already have *"No Fishing"* signs up. Is that for the general public or for residents? If it's for the general public, it should say, *"No Fishing by Non-Residents."* I really don't care. The other issue I had was just general parking primarily along Scarlett Avenue. There are people that park the wrong way in the street, on the grass, leaving them there for a month or two, pretty much do whatever they want. What are the rules of parking? I've talked to HOA

management. He says there are parking rules. I've talked with other members of the community, they say the CDD does not have no parking rules. So what are the rules? That needs to be communicated to the general population. If there are parking rules, they're evidently not being enforced. Other than that, that's all I have.

Ms. Adams: Thank you. Are there any other members of the public who'd like to make a comment or statement to the Board?

Resident (Fran Dobler, Scarlett Avenue): I just need to clarify that the dog park and the parking lot are out.

Mr. Szewczyk: The parking was with dog park so that's out.

Resident (Fran Dobler, Scarlett Avenue): So, we don't have to worry about it. I just needed to clarify that. Thank you. You guys are doing a good job. You work hard.

Ms. Adams: Are there any other members of the public who'd like to make a comment?

Resident (Marilyn Hunt, Scarlett Avenue): We're down two umbrellas by the pool. There are only three total, so we have one left. It gets very hot, very sunny out there. Our discussions have been to just go and buy an umbrella, but apparently that's not how this works, but we need umbrellas. Thank you.

Ms. Adams: Are there any other comments or statements to the Board from audience members? Hearing none,

NINTH ORDER OF BUSINESS

Staff Reports

A. District Counsel

Ms. Adams: Sarah?

Ms. Sandy: I don't have anything additional to report unless the Board has questions for me.

Ms. Adams: Mr. Chairman, would you like for District Counsel to go over the Parking Rules that are in conjunction with the City of North Port and any agreements that are in place?

Mr. Szewczyk: Sure.

Ms. Adams: Sarah, you may not have heard, but during public comment there was a question regarding parking on the streets. I know that you worked out an agreement with City of North Port. Could you kindly provide an overview of that parking agreement?

Ms. Sandy: Certainly. The Board might have received from me a summary of the District roadways. There is an Enforcement Agreement with the City of North Port, whereby the city's

parking regulations apply to the CDD's roadways and the City of North Port has parking authority. The parking regulation provided by the City also applies to the CDD roadways. If you don't mind, please give me one second. I'm just trying to get that information to provide a summary of the current ordinance by the City of North Port.

Ms. Adams: Sarah, while you're looking that up, typically with City Ordinances and traffic laws, there are typically two arms of the city that enforce parking regulations. One would be the Police Department and the other would be Code Enforcement. Is that the case here at Lakeside Plantation that both Code Enforcement and the police can enforce the parking rules?

Ms. Sandy: Yes. That is the method through which the enforcement of the parking regulations on the roadways would be enforced. The city, a few years ago, updated their parking regulations. Currently it provides that, while street parking is not allowed except with some exceptions, deliveries, and pick ups, the parking of motor vehicles are actually allowed on the berm or the swales in front of residential lots, with either permissions by the owner of the lot or by the lot owner themselves. But again, that is limited to motor vehicles within the ordinance and generally applies to cars, SUVs, vans. It does not expand out to large recreational vehicles or anything like that. In order to be properly parked, you have to be parked to the direction of traffic, have all four wheels on the road and they cannot be blocking the sidewalk. There are additional changes that were made through to the Ordinance, but those might be part of the main updates that caused the changes in how street parking was occurring within the District.

Mr. Roumy: Thank you for responding to my email. I'm not really 100 percent convinced because the city assumes that the ownership of that property owns also the area between the sidewalk and the road, you call it the swale. In our case, it's not, the CDD owns that property. Therefore, we own this property and we have the right to say, who can park and who can't park.

Ms. Sandy: Supervisor Roumy emailed me as a follow-up to my e-mail summarizing the street parking issue. I respectfully disagreed with him that I didn't think that the Ordinance assumed that the lot owner owned the swale portion, but the District's roads fall under the city's jurisdiction and therefore, we must comply with their parking regulations, which include regulating who can park on the swale.

Mr. Szewczyk: So, the bottom line is you can park on the right-of-way (ROW)/berm/swale, whatever you want to call it, facing the proper way on your property and

you have to have permission from anybody else to park in front of their house. Is that correct, Sandy?

Ms. Sandy: Correct.

Mr. Szewczyk: Okay. If you have a complaint, you got to call the city Police Department because that's a parking issue.

Mr. Roumy: So tomorrow I can park on the swale.

Mr. Szewczyk: In front of your house?

Mr. Roumy: Yes.

Mr. Szewczyk: Absolutely.

Mr. Sabol: And if you give your neighbor permission, he can park there too.

Ms. Sandy: The city provided to us a diagram.

Ms. Chichelli: Can that be overruled by an HOA that's saying, "We have that within this community and we don't want to allow that?"

Ms. Sandy: No. The HOA doesn't have jurisdiction that would trump the city. I'm speaking as a non-HOA attorney, but I can certainly defer to the HOA's attorney. The covenants that the HOA operates under is enforced against everyone that live within the community and then you have an enforcement mechanism under that declaration. So they could use it to where you can't have more than two cars parks in front of your house or out in your driveway. Then they can use signage to enforce that. They can't necessarily tow your car from the CDD ROW, but they might have other enforcement mechanisms to enforce the declarations.

Mr. Sabol: Sarah, I have a hypothetical question for you. If someone is parked in front of my house and they did not have permission and oil is leaking out their car and kills my grass, the CDD is not responsible for that and it then that goes to a civil suit. Is that correct? If I have a problem with someone, is that the way I can do it?

Ms. Sandy: You mean if somebody damaged your car while parked in the CDD?

Mr. Sabol: Yes. If they destroyed my grass, for instance, the CDD is not responsible.

Ms. Sandy: Were they parked in front of your house?

Mr. Sabol: Yes. They don't not have permission to be there. So, I wouldn't go to the CDD. I would file a civil suit and settle with whoever was responsible. Is that correct?

Ms. Sandy: Are they on a swale?

Mr. Sabol: Yes.

Ms. Chichelli: You call the police.

Ms. Sandy: Under an agreement, the swale is maintained by the homeowner because the property is in front of it. The homeowner could go after someone else. He could try to look into it.

Mr. Sabol: The point I'm trying to make is CDD is only responsible so far and then it goes to civil court and the laws. That's the only thing I'm saying, just so everyone understands. That's all I have.

Mr. Roumy: I have a different question for you, Sarah. We have two different types of single-homes. Maybe a dozen of homes.

Mr. Szewczyk: No. It's more like 80.

Mr. Smith: Fifty seven to 58 homes or 24% percent.

Mr. Roumy: Don't they have different covenants than the HOA?

Mr. Szewczyk: I don't think they have any covenants. They can do what they want.

Ms. Adams: They are subject to the City Ordinances.

Ms. Sandy: I really would have to defer to the HOA.

Mr. Szewczyk: I believe our master covenants were not renewed. I don't think we have any that exist right now.

Ms. Adams: Just so Board Members are aware, this is not really a CDD matter, but since you're discussing it, the City may have Ordinances that regulate private property. So, you can always check with code enforcement for the City of North Port if there's a situation that needs attention.

Mr. Szewczyk: I think the diagram that Sarah was talking about, maybe we need to send that out to.

Ms. Adams: The parking 101?

Mr. Szewczyk: Yeah. Just as a review because it does state the number of vehicles based on the lot size and the size of the vehicles. So, that might not be a bad idea to send it out.

Ms. Adams: Staff is happy to do that. We will confirm that the information is still accurate with the City of North Port, or alternatively download it directly from their website and work on getting that out via an email blast.

Mr. Roumy: Do you have a question, Sue?

Resident (Sue Martin, Scarlet Avenue): I did. It's so convoluted the way this whole thing was set up from the get-go. The CDD owns the easement area, the homeowners responsible for it, the HOA document says no parking on landscaped property. The easement is landscaped and has sprinkler heads. The HOA pays a landscaper to fertilize and mow that area every week or every time it rains. It just does not make sense to allow parking on that easement area. I've always understood that if the HOA covenants were stricter than the local government, then HOA documents take precedence. That's what I've always been told.

Mr. Szewczyk: That's just for the HOA to bring up, if they want to pursue that. But as far as we're concerned, we follow the city, and you're right, Sue, I totally agree with you. The whole thing is convoluted, but there's nothing we can do about it unless the HOA wants to pursue it any further.

Mr. Sabol: The previous people developed our situation here. They are really to fault for all of this, because some agreements should've been brought forth 10, 12, 15 years ago.

Resident (Sue Martin, Scarlet Avenue): That doesn't solve the problem.

Mr. Sabol: No, it does not.

Ms. Adams: Are there any other questions for Sarah, related to any legal matters?

B. District Manager

Ms. Adams: The next item on the agenda is the District Manager's report. Earlier in the meeting, one of the questions that came up was how residents can stay informed about CDD matters. I want to make sure that all residents understand that there is a CDD website, LakesidePlantationCDD.com. That website is promoted in the monthly newsletter. The monthly newsletter is distributed via electronic mail, so sure that you've signed up to receive electronic mail. On the LakesidePlantationCDD.com website, a week before the meetings, the agendas are published. So, everything that the Board Members are reviewing tonight is published on the website. It's there and available for resident review. That's one good way to keep track of items that the Board will be discussing and considering.

i. Action Items List

Ms. Adams: The next item is the Action Items List. In the interest of saving time, I will state that the Action Items List is included in the agenda packet. I will update that in accordance with Board Member discussion and direction from tonight, unless you have any questions or

comments or would like to discuss it further. If not, we can move on to the Amenity Manager's Report.

Mr. Roumy: I have a question.

Ms. Adams: Yes, Sir.

Mr. Roumy: Are we in the process of purchasing more umbrellas and tables?

Ms. Adams: I don't know the status of the umbrella purchases.

Mr. Roumy: There's one umbrella.

Ms. Adams: I did make a note because that is an amenity management issue. We can discuss that under the Amenity Manager's Report.

Mr. Roumy: Maybe add more umbrellas and tables.

Ms. Adams: Is the Board ready to move on to Amenity Manager's Report?

Mr. Szewczyk: Yes.

C. Amenities Manager – Monthly Report

Ms. Adams: Tamara is on the line tonight. We also have Scott Smith here. Tamara can you hear us okay?

Ms. Lorf: Yes, I can hear you. Hello everybody. I do miss being there being part of it. I want to thank you for everything. You know that I really enjoyed being here and working with everybody. You are all great. Here is my Amenity Report. If anyone has any questions about the project update, I'm happy to answer them.

Ms. Adams: Supervisor Chichelli has a question.

Ms. Chichelli: I just have one question, Tamara. Do we have a timer for the fountains?

Ms. Lorf: There is a timer. We just put a new one in behind the breaker box.

Ms. Chichelli: Okay.

Ms. Lorf: Moving forward, it should be dry in there and shouldn't have any problems. The person who replaces our motors for the fountains and our pool, told me today that he would come out on Tuesday to train staff on how to clean those filters. They don't provide maintenance for it because they don't want the liability, but they do understand how they work.

Ms. Chichelli: Okay. Thank you.

Ms. Lorf: So, it will be on a weekly basis for the maintenance man to go out there to check those.

Ms. Chichelli: Thank you.

Ms. Lorf: Are there any questions on the report?

Mr. Szewczyk: No.

Ms. Lorf: Under events, we are going to have the Halloween trick-or-treating. I sent Tricia an email from the city regarding closing the road.

Mr. Szewczyk: That's the way it's been done in the past. We've blocked off Scarlett Avenue and that's where the police presence was.

Ms. Lorf: Okay. They would start that by the Boulevard and not the Clubhouse. Correct?

Mr. Szewczyk: It's the loop around the Clubhouse.

Ms. Lorf: Thank you. A resident made a comment earlier about the Amenity Manager saying there was a charge to residents for rental fees. I just want to note that's never been said. Of course there isn't a charge for it. I was just informed that all three umbrellas recently broke in the last month. The other two just this weekend broke. We tried to have them fixed because those umbrellas are very nice and are \$400 each. If they can't fix them, we will replace those. So we should have an answer by Friday if they can be fixed. If not, we will order them right away. Do you want a certain type to replace those umbrellas or maybe add a few more?

Mr. Szewczyk: Well, you can only add umbrellas to tables and we only have so many tables out there.

Mr. Roumy: We only have three tables.

Ms. Adams: You can purchase umbrella stands.

Mr. Szewczyk: Okay.

Mr. Roumy: We need a minimum of six tables and six umbrellas.

Mr. Szewczyk: Like Tricia just said, we don't necessarily need the additional tables, but we can put the umbrellas on a stand. So the timeframe on repairing those, if they can do it, what is the turnaround time on getting those umbrellas back?

Ms. Lorf: By this weekend.

Mr. Szewczyk: If they can't get them or if they can't repair them, then what is the turnaround time on purchasing new ones?

Ms. Lorf: It depends on several factors. If we get new ones, we have to pay for shipping or we could get them from Home Depot. It depends on what you want to spend.

Mr. Szewczyk: At that point, I would rather just get them here.

Ms. Adams: It's a maintenance item. There is discretion for amenity management to purchase. This time of year after Labor Day, sometimes there are sales from local providers. I would be happy to work with Tamara on that and see what we can come up with if the current ones cannot be repaired.

Mr. Szewczyk: Okay. The other thing would be I think we should still look into getting three free standing umbrellas.

Ms. Adams: Yes. I heard that six is a target number for umbrellas out there.

Mr. Szewczyk: So, we would have three tables and then three other free standing ones. I would like to get some prices on that.

Ms. Lorf: Okay. Do you want to look at replacing those two right away?

Mr. Szewczyk: Yes.

Ms. Adams: We will look at their inventory of six with the additional three holders. Again, this time of year, you can sometimes pick up a bargain. Although, this particular year, I don't know if that is the case because they are having shortages. We will see what we can do.

Mr. Szewczyk: Okay.

Mr. Roumy: I have a question for you.

Ms. Adams: Is this a question on the Amenity Manager's Report or a question for Tamara?

Mr. Roumy: A question for Tamara. Tonight, we had a complaint about the fountain area and pergolas need to be painted.

Ms. Lorf: Yes.

Mr. Roumy: Who is responsible to clean up this area?

Ms. Lorf: I believe that the fountains were power washed.

Mr. Roumy: So, what is the resident talking about? She says it is not cleaned. It's dirty.

Ms. Chichelli: Every year it gets cleaned.

Ms. Lorf: Our maintenance man has been on the Boulevard picking up trash. I personally have been out there too on a golf cart picking up garbage.

Mr. Sabol: But we have had some extreme winds.

Mr. Roumy: There was another complaint about the condition of that area.

Ms. Chichelli: I think we had hired someone to do the entire area. We had to trim the bushes. Last year, we did the same thing.

Mr. Sabol: Once we get new maintenance people in place, that probably will be part of their scope. Okay. Thank you.

Ms. Lorf: I will work with Tricia on the traffic enforcement. The last item was regarding Sue and her remarks about staff. *These comments could not be heard by the transcriber as Ms. Lorf was attending via speakerphone.*

Mr. Szewczyk: Okay.

Ms. Adams: Are there any other questions for Tamara?

Mr. Roumy: Tamara, thank you for your services. You did a good job for the short period that you were here. Good luck in your future endeavors.

Ms. Lorf: Thank you. I appreciate it.

Ms. Adams: Thank you, Tamara.

D. Landscape Maintenance Update

Ms. Adams: Supervisor Chichelli has been working with Bloomings regarding compliance with the Landscape Agreement and I believe she has some dates for some upcoming service.

Ms. Chichelli: I do. Tamara had asked about the Palm trimming around the pool area. They are scheduled for September 29th and September 30th.

Ms. Lorf: Okay.

Ms. Chichelli: Right now the flower beds are being changed. I know that the prior flowers did not do good. They saw that, so we should have new ones. The branches of the Oak trees were trimmed. I think they will be at the next meeting.

Ms. Adams: Yes.

Mr. Roumy: I have a questions for Pina. Who is responsible to spray for ants around the pool? Is it Bloomings?

Ms. Chichelli: They should be.

Ms. Chichelli: Do we have ants?

Mr. Roumy: You cannot sit in the corner because there are ants all over the place.

Ms. Chichelli: Okay. I will address that with them.

Mr. Roumy: We should have them come in once a month and spray.

TENTH ORDER OF BUSINESS

Other Business

There being none, the next item followed.

ELEVENTH ORDER OF BUSINESS

Supervisor's Requests

There being none, the next item followed.

TWELFTH ORDER OF BUSINESS

Closed Session - Confidential

- A. Consideration of Addendum to Agreement with Relion Solutions, LLC Regarding Security Patrol Services**
- B. Consideration of Proposals for Access Control System**
- C. Consideration of Proposals for Security Cameras**
- D. Board Action Related to Security Matters**

The meeting was recessed at 9:08 p.m. for a Closed Session. All Members of the Public were asked to leave the room.

Ms. Adams: We are back in the public session and the door was re-opened in case any members of the public want to come in. The record will reflect that no Members of the public are returning. Would the Board like to make a motion to approve the agreement addendum with Relion Solutions, LLC., extending the terms of the agreement.

On MOTION by Mr. Szewczyk seconded by Mr. Sabol with all in favor the Addendum to the Agreement with Relion Solutions, LLC Regarding Security Patrol Services was approved.

THIRTEENTH ORDER OF BUSINESS

Adjournment

On MOTION by Ms. Chichelli seconded by Ms. Benjamin with all in favor the meeting was adjourned.

Secretary/Assistant Secretary

Chairman/Vice Chairman

SECTION B

Lakeside Plantation

Community Development District

Summary of Invoices

September 1, 2021 to September 30, 2021

Fund	Date	Check No.'s	Amount
General Fund	9/8/21	2595-2604	\$ 27,067.17
	9/29/21	2605-2625	\$ 62,597.62
			<u>\$ 89,664.79</u>
Capital Reserve Fund	9/8/21	120-121	\$ 23,173.00
			<u>\$ 23,173.00</u>
Automatic Drafts- June			
Florida Power & Light		2200 Plantation Blvd - Clubhouse	\$ 1,158.06
		2200 Plantation Blvd - Fountain	\$ 349.31
		2200 Plantation Blvd - Pool	\$ 613.99
North Port Utilities		2200 Plantation Blvd - Clubhouse	\$ 166.08
		2200 Plantation Blvd - Pool	\$ 381.61
		2201 Plantation Blvd - Garbage Collection	\$ 168.47
TECO Peoples Gas		2200 Plantation Blvd - Clubhouse Fireplace	\$ 16.07
Comcast		2200 Plantation Blvd - Clubhouse	\$ 641.98
FLDepartment of Revenue		Sales and Use Tax	\$ 117.38
			<u>\$ 3,612.95</u>
			<u>\$ 93,277.74</u>

CHECK DATE	VEND#	INVOICE DATE	INVOICE YRMO	EXPENSED TO DPT	ACCT#	SUB	SUBCLASS	VENDOR NAME	STATUS	AMOUNT	***CHECK*** AMOUNT
9/08/21	00353	8/18/21	BB081820	202108	310-51300-11000			BONNIE J BENJAMIN	*	200.00	200.00 002595
			BOS MEETING 8/18/21								
9/08/21	00342	8/18/21	BR081820	202108	310-51300-11000			BILL ROUMY	*	200.00	200.00 002596
			BOS MEETING 8/18/21								
9/08/21	00010	8/01/21	2021-024	202108	320-53800-46400			LANDSCAPE MAINT AUG21	*	7,655.00	7,655.00 002597
								BLOOMINGS LANDSCAPE & TURF MGMT, INC	*	850.00	850.00 002598
9/08/21	00260	8/10/21	90001	202108	330-53800-51100			POOL MAINT AUG21	*	200.00	200.00 002599
								DART POOL SOLUTIONS, INC	*	1,653.75	1,653.75 002600
9/08/21	00056	8/18/21	JS081820	202108	310-51300-11000			JOE SZEWCZYK	*	200.00	200.00 002601
			BOS MEETING 8/18/21					JOHNSON ENGINEERING, INC.	*	147.00	147.00 002602
9/08/21	00193	8/26/21	69	202108	310-51300-31100			ENGINEERING FEES	*	966.00	966.00 002603
								MARIA J CHICHELLI	*	14,995.42	14,995.42 002604
9/08/21	00282	8/18/21	PC081820	202108	310-51300-11000			SECURITY SYSTEM	*	450.00	450.00 002605
								SECURITY ALARM CORP.	*	200.00	200.00 002606
9/08/21	00041	8/04/21	238938	202108	330-53800-48400			LAKE/POND MAINT AUG21	*	966.00	966.00 002607
								SOLITUDE LAKE MANAGEMENT LLC	*	14,995.42	14,995.42 002608
9/08/21	00257	8/01/21	387860	202108	330-53800-12000			FACILITY MGNT SVC AUG21	*	450.00	450.00 002609
								VESTA PROPERTY SERVICES, INC.	*	200.00	200.00 002610
9/29/21	00367	9/29/21	09292021	202109	330-53800-48000			EVENT	*	450.00	450.00 002611
								BLUE WAVE ROCKETS	*	200.00	200.00 002612
9/29/21	00353	9/15/21	BB091520	202109	310-51300-11000			BOS MEETING 9/15/21	*	200.00	200.00 002613
								BONNIE J BENJAMIN	*	200.00	200.00 002614
								LKSD LAKESIDE PLANT HSMITH	*	200.00	200.00 002615

CHECK DATE	VEND#	DATE	INVOICE	YRMO	DPT	ACCT#	SUB	SUBCLASS	VENDOR NAME	STATUS	AMOUNT	CHECK.... AMOUNT #
9/29/21	00190	9/14/21	002	202109	320-53800-47200				BRADLEY A. RAY, INC.	*	1,998.00	1,998.00 002607
9/29/21	00200	9/15/21	AS091520	202109	310-51300-11000				BOS MEETING 9/15/21	*	200.00	200.00
9/29/21	00342	9/15/21	BR091520	202109	310-51300-11000				ALAN SABOL	*	200.00	200.00 002608
9/29/21	00010	8/28/21	2021-026	202108	320-53800-46700				BILL ROUMY	*	75.00	200.00 002609
8/28/21		2021-026	202108	320-53800-46700					CAP HEADS ALONG BASKETBAL	*	200.00	75.00
8/28/21		2021-026	202108	320-53800-47300					INSTALL MULCH IN PLANT	*	200.00	200.00
9/01/21		2021-027	202109	320-53800-46400					LANDSCAPE MAINT SEPT2021	*	7,655.00	7,655.00
9/29/21	00260	9/02/21	90016	202109	330-53800-51100				BLOOMINGS LANDSCAPE & TURF MGMT, INC	*	850.00	7,930.00 002610
9/03/21		T1325	202109	330-53800-51000					POOL MAINTENANCE SEPT2021	*	515.00	850.00
9/13/21		14331	202109	300-15500-10000					REPLACE POOL STENNER PUMP	*	16,501.00	1,365.00 002611
9/13/21		102759	202108	330-53800-48700					DART POOL SOLUTIONS, INC	*	16,501.00	16,501.00 002612
8/13/21		102759	202108	330-53800-48700					EGIS INSURANCE ADVISORS, LLC	*	145.00	145.00
9/01/21		128	202109	310-51300-34000					FITNESS LOGIC	*	3,187.17	145.00 002613
9/01/21		128	202109	310-51300-35100					MANAGEMENT FEES SEPT21	*	83.33	3,187.17
9/01/21		128	202109	310-51300-31300					INFORMATION TECH SEPT21	*	83.33	83.33
9/01/21		128	202109	310-51300-51000					DISSEMINATION SVC SEPT21	*	.12	.12
9/01/21		128	202109	310-51300-42000					OFFICE SUPPLIES	*	32.97	32.97
9/01/21		128	202109	310-51300-42500					POSTAGE	*	299.55	299.55
9/01/21		128	202109	310-51300-42500					COPIES	*	299.55	299.55
9/01/21		128	202109	310-51300-42500					GOVERNMENTAL MANAGEMENT SERVICES	*	3,686.47	3,686.47 002614
9/01/21		128	202109	310-51300-42500					COPIES	*	299.55	299.55

LKSD LAKESIDE PLANT HSMITH

CHECK DATE	VEND#	INVOICE DATE	INVOICE YRMO	EXPENSED TO... DPT ACCT#	SUB SUBCLASS	VENDOR NAME	STATUS	AMOUNT	CHECK..... AMOUNT #
9/29/21	00066	8/13/21	124967	202107	310-51300-31500	ATTORNEY FEES	*	569.44	
9/14/21	125079	202108	310-51300-31500	ATTORNEY FEES			*	2,149.77	
9/29/21	00358	8/02/21	1346	202108	320-53800-43000	PLUMBING	*	200.00	2,719.21 002615
8/02/21	1347	202108	330-53800-48102	REPLACED TOE KICKS			*	250.00	
8/02/21	1348	202108	330-53800-48700	MIRROR INSTALLATION			*	300.00	
8/23/21	1390	202108	330-53800-48700	A/C SERVICE MAINT			*	145.00	
9/29/21	00056	9/15/21	JS091520	202109	310-51300-11000	BOS MEETING 9/15/21	*	200.00	895.00 002616
9/29/21	00105	8/09/21	5260	202108	330-53800-48102	REPLACEMENT SPEK MOTOR	*	1,179.90	200.00 002617
9/01/21	5320	202109	330-53800-48102	FOUNTAIN FILTER PUMP			*	497.40	
9/29/21	00193	9/22/21	70	202109	310-51300-31100	ENGINEERING FEES	*	2,317.11	1,677.30 002618
9/29/21	00282	9/15/21	MC091520	202109	310-51300-11000	BOS MEETING 9/15/21	*	200.00	2,317.11 002619
9/29/21	00037	8/10/21	55371	202108	330-53800-48400	SECURITY SVC	*	257.50	200.00 002620
9/29/21	00303	9/22/21	#2	202109	330-53800-48401	MAY-SEPT 2021	*	9,240.00	257.50 002621
9/29/21	00272	9/01/21	PI-A0067	202109	320-53800-46000	LAKE/POND MAINT SEPT21	*	966.00	9,240.00 002622
								966.00	966.00 002623

LKSD LAKESIDE PLANT HSMITH

CHECK DATE	VEND#	INVOICE DATE	INVOICE YRMO	EXPENSED TO DPT ACCT#	SUB SUB	SUBCLASS	VENDOR NAME	STATUS	AMOUNT	CHECK.... AMOUNT
9/29/21	00361	7/31/21	00109	202107	330-53800-48102		PAINT	*	147.92	
THE SHERWIN-WILLIAMS CO.										
9/29/21	00257	9/01/21	388739	202109	330-53800-12000		FACILITY MGMT SEPT2021	*	11,302.11	
VESTA PROPERTY SERVICES, INC.										
									147.92	002624
									11,302.11	002625
TOTAL FOR BANK A									89,664.79	
TOTAL FOR REGISTER									89,664.79	

LKSD LAKESIDE PLANT HSMITH

8/31/2021

Mail - Tamara Lorf - Outlook

Security Alarm Corporation
17776 Toledo Blade Boulevard
Port Charlotte, FL 33948
Tel. (941) 625-9700
Fax. (941) 625-9804
accounting@securityalarmcorp.com

all approved 8/26/21



Please call into our office to discuss how to pay
your invoice by ACH or Credit Card, also you can
now receive your invoice by email for your convenience.

Invoice Number
Sale Date
Due Date

238938
8/4/2021
8/14/2021

Lakeside Plantation CDD
Care Of: GMS
219 E Livingston St
Orlando, FL 32801

330-53800-48400

Description	Qty	Price	Net	Tax	Total
Monitoring-Commercial-Fire-Basic	3	\$28.00	\$84.00	\$0.00	\$84.00
For: Lakeside Plantation-F at 2200 Plantation Blvd. North Port, FL 34286 Period Covered: 08/01/2021 to 10/31/2021 inclusive.					
Monitoring-Commercial-Security-Basic	3	\$21.00	\$63.00	\$0.00	\$63.00
For: Lakeside Plantation at 2200 Plantation Blvd. North Port, FL 34289 Period Covered: 08/01/2021 to 10/31/2021 inclusive.					
TOTALS		\$147.00	\$0.00	\$147.00	

To ensure proper credit please include the invoice number on your check or visit our website to pay online. Please pay
exact amount. If applicable, a late fee will be assessed on payments received 10 days or more past the due date.
Celebrating 40 years of success.

Return Stub Below

Please return this portion of your invoice with your payment. Thank you!

Customer : Lakeside Plantation CDD



Acct. Bal.		\$147.00	Amount Remitted		Invoice Number	238938
Payment Method	Check	☐	Check Number		Bill Payer ID	11765
	Charge*	☐	Card Number		CSID	
			Name On Card		Date Remitted	
Signature				Billing Zipcode		
				Exp Date		
				Card ID		

*Please Note : If paying by charge card, we can only accept payment by : American Express, Discover, Mastercard, Visa
Please remit to : Security Alarm Corporation, 17776 Toledo Blade Boulevard, Port Charlotte, FL 33948

Inv # 238938

Page 1



Invoice

5824 Bee Ridge Road #165, Sarasota, FL 34233

Date	Invoice #
8/1/2021	2021-01428

寄 To:

Lakeside Plantation CDD
c/o Governmental Management Services
219 East Livingston Street
Orlando, FL 32801

all approved
8/26/21

320-53800-416400

Terms	Due Date
Net 30	8/31/2021

Description	Qty	Amount
Month of August Monthly Grounds Maintenance Fee		7,635.00

PAYMENT ACCEPTED: CHECK AND CREDIT CARD.

Make check payable to:

Bloomings Landscape & Turf Management, Inc.

Please include invoice number on your check.

Thank You For Your Business

Total 57,655 (M)

Payments/Credits	\$0.00

Balance Due	\$7,653.00

Phone #

Fax #

E-mail

Web Site

(9-11) 927-9765

(941) 929-9356

carl@bloominglandscape.com

www.bloominglandscape.com

8/31/2021

Mail - Tamara Lorf - Outlook

Vesta

Invoice

Vesta Property Services, Inc
245 Riverside Avenue
Suite 300
Jacksonville FL 32202

Invoice # 387860
Date 8/1/2021

Terms

Due Date 8/31/2021

Memo Aug 2021 Fees

Bill To
Lakeside Plantation C.D.D.
c/o Governmental Mgmt Svcs-CF, LLC
9145 Narcoossee Road, Suite A205
Orlando FL 32827

330-S3800-12000

all approved 8/26/21

Description	Quantity	Rate	Amount
Facility Manager Services at Lakeside Plantation Amenity Center	1	5,202.00	5,202.00
Office Administrative Assistant Services at Lakeside Plantation Amenity Center	1	2,281.08	2,281.08
Facility Attendants Services at Lakeside Plantation Amenity Center	1	2,587.92	2,587.92
Facility Maintenance Services at Lakeside Plantation Amenity Center	1	4,924.42	4,924.42
Total			\$14,995.42

DART Pool Solutions, Inc.

1181 S. Sumter Blvd - PMB 324

North Port, FL 34287

CPC1457408

330-53800-51100

Invoice

Date	Invoice #
8/10/2021	90001

Bill To
Lakeside Plantation 2200 Plantation Blvd North Port, FL 34287

Service Location
2200 Plantation Blvd North Port, FL 34289

P.O. No.	Terms	Due Date	Tech	Date of Service
	Net 30	9/9/2021	SB	8/10/2021
Description		Qty	Rate	Amount
Pool maintenance August			850.00	850.00
FL Sales Tax			7.00%	0.00

Thank you for your business!

A finance charge of 1.5 % will be added to all overdue accounts, with a minimum charge of \$1.50. All materials, parts and equipment will remain property of DART until paid in full.

Total	\$850.00
Payments/Credits	\$0.00
Balance Due	\$850.00

Phone	941-743-2010	Fax	941-426-7593
E-mail	Web Site		
info@dartpoolsolutions.com	www.dartpoolsolutions.com		

8/31/2021

Mail - Tamara Lorf - Outlook

SOLITUDE
LAKE MANAGEMENT

Approved 8/26/21
370-53800-46000

INVOICE

Invoice Number: PI-A00652427

Invoice Date: 08/01/21

PROPERTY: Lakeside
Plantation CDD

SOLD TO: Lakeside Plantation CDD
Governmental Mgmt Services-Central
9145 Narcoossee Road, Ste A206
Orlando, FL 32827

CUSTOMER ID
L2077

CUSTOMER PO

Payment Terms
Due upon receipt

Sales Rep ID
Bill Kurth

Shipment Method

Ship Date

Due Date
08/01/21

Qty	Item / Description	UOM	Unit Price	Extension
1	Lake & Pond Management Services SVR06010 08/01/21 - 08/31/21 Lake & Pond Management Services		966.00	966.00

PLEASE REMIT PAYMENT TO:

100 Brookwood Drive, Suite H
Little Rock, AR 72202

Subtotal	966.00
Sales Tax	0.00
Total Invoice	966.00
Payment Received	0.00
TOTAL	966.00

www.generatorsaqua.com

www.generatorsaqua.com

Johnson Engineering, Inc.
 Remit To:
 P.O. Box 2112
 Fort Myers, FL 33902
 Ph: 239.334.0046 Fax: 239.334.3661

Invoice

August 26, 2021
 Project No: 20150050-000
 Invoice No: 69

Project Manager Andrew Tilton

FED #59-1173834

George Flint
 Lakeside Plantation CDD
 c/o Governmental Management Services
 4648 Eagle Falls Pl
 Tampa, FL 33619

Project 20150050-000 Lakeside Plantation CDD
 20150050-000
 Lakeside Plantation CDD
 Work Authorization #3, dated 3/24/15 - Change Order No. 1, dated 11/3/15
 Work Authorization #4, dated 5/27/15
 Work Authorization #5, dated 5/27/15
 Work Authorization #7, dated 1/26/17
 Work Authorization #8, dated 9/18/18

Professional Services through August 15, 2021

310 513 311

PROFESSIONAL SERVICES

Phase No.	Phase Description	Contract Amount	Fee Type	%	Total Inv To-Date	Previously Invoiced	Current Inv Amount	Balance to Complete
1.	General Engineering	66,857.15	T&M	100 %	66,857.15	65,203.40	1,653.75	0.00
	Totals	66,857.15			66,857.15	65,203.40	1,653.75	0.00

SUB-TOTAL PROFESSIONAL SERVICES:

1,653.75

INVOICE TOTAL:

1,653.75

Summary of professional services

Phase No. / Description	Bill Hours	Bill Rate	Billable Amount
1. - General Engineering			
Engineer IX			
Beers, Christopher 8/12/2021	.50	Hrs @ 190.00	95.00
Dog Park Research-SWFWMD & CofNP			
Beers, Christopher 8/13/2021	.50	Hrs @ 190.00	95.00
Dog Park Research-SWFWMD & CofNP			

W-9 Can be found at our Website: www.johnsonengineering.com

Project	20150050-000	Lakeside Plantation CDD			Invoice	69
Engineer IV						
Burford, Brent	8/2/2021	1.00	Hrs @	125.00		125.00
Revising plans and contacting contractors for drainage repairs.						
Burford, Brent	8/4/2021	1.00	Hrs @	125.00		125.00
Contacting contractors for drainage repairs.						
Burford, Brent	8/6/2021	2.50	Hrs @	125.00		312.50
Site visit with contractor for drainage repairs.						
Burford, Brent	8/11/2021	2.00	Hrs @	125.00		250.00
Research in regards to dog park and parking on Scarlett Ave. Conversation with contractor in regard to fountains and aerators.						
Burford, Brent	8/12/2021	1.50	Hrs @	125.00		187.50
Research in regards to dog park and parking on Scarlett Ave and coordination with JEL staff.						
Burford, Brent	8/13/2021	1.00	Hrs @	125.00		125.00
Research in regards to dog park and parking on Scarlett Ave and coordination with SWFWMD staff.						
Engineer IX						
Tilton, Andrew	8/12/2021	.50	Hrs @	190.00		95.00
Discussion with Brent about parking and dog park considerations.						
Technician II						
Marino, Brian	7/20/2021	1.50	Hrs @	65.00		97.50
Created detail of electrical pad trench drain; Revised Aerial detail map;						
Marino, Brian	7/22/2021	1.25	Hrs @	65.00		81.25
Revised drainage details and drainage location exhibits; created sheetset; added data to titleblocks; plotted to PDF						
Marino, Brian	7/28/2021	1.00	Hrs @	65.00		65.00
Revised details; Created location map;						
1. - General Engineering Total		14.25				1,653.75

From: Tricia Adams tadams@gmscfl.com
Subject: Re: Invoice 20150050-000 Lakeside Plantation CDD
Date: September 8, 2021 at 1:09 PM
To: Hannah Smith hsmith@gmstnn.com

approved

Tricia L. Adams

District Manager
Governmental Management Services
219 E. Livingston Street
Orlando, FL 32801

Office 407.841.5524 ext 138
Cell 863.241.8050

"It is not the mountain we conquer but ourselves."
—Edmund Hillary

On Sep 8, 2021, at 12:19 PM, Hannah Smith <hsmith@gmstnn.com> wrote:

Tricia,

I am cutting LSP checks today, can you please approve the following engineering invoice? It is the only admin one I have for today. Thank you!

****WE HAVE MOVED, PLEASE NOTE NEW OFFICE ADDRESS****

Best Wishes,
Hannah Smith
Governmental Management Services
4648 Eagle Falls Pl
Tampa, FL 33619
Phone: (813) 422-7758 ext 136

Begin forwarded message:

From: "Patricia Romano" <plr@johnsoneng.com>
Subject: Invoice 20150050-000 Lakeside Plantation CDD
Date: August 26, 2021 at 3:52:06 PM EDT
To: HSmith@gmstnn.com
Cc: ckeen@johnsoneng.com, mfc@johnsoneng.com
Reply-To: plr@johnsoneng.com

Invoice on behalf of Andy Tilton, Project Manager.
Thank you

<Invoice.pdf>

Attendance Confirmation
for
BOARD OF SUPERVISORS

District Name: Lakeside Plantation CDD

Board Meeting Date: August 18, 2021

	<i>Name</i>	<i>In Attendance Please ✓</i>	<i>Fee Involved Yes / No</i>
1	Bill Roumy	✓	Yes (\$200)
2	Bud Sabol	absent	Yes (\$200)
3	Joe Szewczyk	✓	Yes (\$200)
4	Bonnie Benjamin	✓	Yes (\$200)
5	Pina Chichelli	✓	Yes (\$200)

Aug 001 310 513 11000
The supervisors present at the above referenced meeting should be compensated accordingly.

Approved for Payment:

Adam
District Manager Signature

08/18/2021
Date

****RETURN SIGNED DOCUMENT TO District Accountant****

Attendance Confirmation
for
BOARD OF SUPERVISORS

District Name: Lakeside Plantation CDD

Board Meeting Date: September 15, 2021

	<i>Name</i>	<i>In Attendance Please ✓</i>	<i>Fee Involved Yes / No</i>
1	Bill Roumy	✓	Yes (\$200)
2	Bud Sabol	✓	Yes (\$200)
3	Joe Szewczyk	✓	Yes (\$200)
4	Bonnie Benjamin	✓ <i>OKNO</i>	Yes (\$200)
5	Pina Chichelli	✓	Yes (\$200)

310 51300 11000
The supervisors present at the above referenced meeting should be compensated accordingly.

Approved for Payment:

Adams
District Manager Signature

09/15/2021
Date

****RETURN SIGNED DOCUMENT TO District Accountant****

Hopping Green & Sams

Attorneys and Counselors

119 S. Monroe Street, Ste. 300
P.O. Box 6626
Tallahassee, FL 32314
850.222.7500

===== STATEMENT =====

August 13, 2021

Lakeside Plantation Community Development District
9145 Narcoossee Rd, Ste. A206
Orlando, FL 32827

Bill Number 124967
Billed through 07/31/2021

General Counsel/Monthly Meeting

LPCDD 00001 SRS

310 51300 31500

FOR PROFESSIONAL SERVICES RENDERED

07/15/21	LMG	Review meeting minutes and provide comments.	0.60 hrs
07/16/21	LMG	Review effective date of Kings III contract; prepare non-renewal letter regarding same.	0.50 hrs
07/20/21	SRS	Review Kings III Agreement Notice of Termination.	0.20 hrs
Total fees for this matter			\$428.00

DISBURSEMENTS

Travel	192.48
Travel - Meals	12.69
Total disbursements for this matter	\$205.17

MATTER SUMMARY

Gentry, Lauren M.	1.10 hrs	265 /hr	\$291.50
Sandy, Sarah R.	0.20 hrs	285 /hr	\$57.00
TOTAL FEES			\$348.50
TOTAL DISBURSEMENTS			\$205.17
INTEREST CHARGE ON PAST DUE BALANCE			\$15.77
TOTAL CHARGES FOR THIS MATTER			<u>\$569.44</u>

BILLING SUMMARY

Gentry, Lauren M.	1.10 hrs	265 /hr	\$291.50
Sandy, Sarah R.	0.20 hrs	285 /hr	\$57.00
TOTAL FEES			\$348.00
TOTAL DISBURSEMENTS			\$205.17

=====

INTEREST CHARGE ON PAST DUE BALANCE	\$15.77

TOTAL CHARGES FOR THIS BILL	\$569.44

Please include the bill number with your payment.

From: Tricia Adams tadams@gmscfl.com 
Subject: Re: LSP Admin Invoices
Date: September 27, 2021 at 3:44 PM
To: Kim Hancock KimH@hgslaw.com
Cc: Hannah Smith hsmith@gmstrn.com, Sarah Sandy SarahS@hgslaw.com

Got it — thank you Kim.

Hannah - the attached is ready to be processed.

Have a good day everyone,

Tricia L. Adams

District Manager
Governmental Management Services
219 E. Livingston Street
Orlando, FL 32801

Office 407.841.5524 ext 138
Cell 863.241.8050

"It is not the mountain we conquer but ourselves."
—Edmund Hillary



LPCDD001-
revised.pdf

On Sep 27, 2021, at 3:08 PM, Kim Hancock <KimH@hgslaw.com> wrote:
<LPCDD001-revised.pdf>

310 51300 31500

Hopping Green & Sams

Attorneys and Counselors

119 S. Monroe Street, Ste. 300
P.O. Box 6526
Tallahassee, FL 32314
850.222.7500

===== STATEMENT =====

September 14, 2021

Lakeside Plantation Community Development District
9145 Narcoossee Rd, Ste. A206
Orlando, FL 32827

Bill Number 125079
Billed through 08/31/2021

General Counsel/Monthly Meeting**LPCDD 00001 SRS****FOR PROFESSIONAL SERVICES RENDERED**

08/09/21	SRS	Review draft minutes; confer with Adams regarding tennis rate schedule and FY 2022 budget documents; review correspondence regarding pool lighting.	0.50 hrs
08/12/21	DGW	Draft resolution adopting amended amenity policies.	0.70 hrs
08/16/21	SRS	Prepare amenity rules hearing resolution and revised amenity rules and rates; review correspondence regarding street parking enforcement; prepare for board meeting.	1.60 hrs
08/18/21	SRS	Prepare for and attend board meeting; conduct follow-up regarding same.	2.50 hrs
08/19/21	DGW	Board meeting follow-up; prepare security systems memorandum; prepare amendments to landscape maintenance, security services, and amenity services agreements.	1.80 hrs
08/30/21	SRS	Prepare renewals for Vesta, Bloomings, and Relion; prepare agreements for pool heaters and Innotech Construction.	0.70 hrs
08/30/21	DGW	Prepare agreements for pool heater installation and corridor ceiling installation; revise contract amendments.	1.80 hrs
Total fees for this matter			\$2,134.00

MATTER SUMMARY

Wilbourn, David - Paralegal	4.30 hrs	145 /hr	\$623.50
Sandy, Sarah R.	5.30 hrs	285 /hr	\$1,510.50

TOTAL FEES	\$2,134.00
INTEREST CHARGE ON PAST DUE BALANCE	\$15.77

TOTAL CHARGES FOR THIS MATTER	\$2,149.77

BILLING SUMMARY

Wilbourn, David - Paralegal	4.30 hrs	145 /hr	\$623.50
Sandy, Sarah R.	5.30 hrs	285 /hr	\$1,510.50

=====

TOTAL FEES	\$2,134.00
INTEREST CHARGE ON PAST DUE BALANCE	\$15.77

TOTAL CHARGES FOR THIS BILL	\$2,149.77

Please include the bill number with your payment.

From: Tricia Adams tadams@gmscfl.com
Subject: Re: LSP Admin Invoices
Date: September 27, 2021 at 3:42 PM
To: Hannah Smith hsmith@gmstnn.com

Billed through August 31 is approved - thank you,

Tricia L. Adams

District Manager
Governmental Management Services
219 E. Livingston Street
Orlando, FL 32801

Office 407.841.5524 ext 138
Cell 863.241.8050

"It is not the mountain we conquer but ourselves."
—Edmund Hillary

On Sep 27, 2021, at 1:45 PM, Hannah Smith <hsmith@gmstnn.com> wrote:

See attached invoice. Also attached is an additional HGS invoice to approve.

*****WE HAVE MOVED, PLEASE NOTE NEW OFFICE ADDRESS*****

Best Wishes,
Hannah Smith
Governmental Management Services
4648 Eagle Falls Pl
Tampa, FL 33619
Phone: (813) 422-7758 ext 136

<Hopping Green & Sams - 124967 - Lakeside Plantation CDD (Bill).pdf>
<Hopping Green & Sams - 125079 - Lakeside Plantation CDD (Bill).pdf>

On Sep 27, 2021, at 1:41 PM, Tricia Adams <tadams@gmscfl.com> wrote:

Approved except HGS — they are billing for an item that is not LSP. Can you send me the invoice and I will send to Sarah Sandy for corrections?

Thank you,

Tricia L. Adams

District Manager
Governmental Management Services
219 E. Livingston Street
Orlando, FL 32801

Office 407.841.5524 ext 138
Cell 863.241.8050

"It is not the mountain we conquer but ourselves."
—Edmund Hillary

Hopping Green & Sams

Attorneys and Counselors

119 S. Monroe Street, Ste. 300
P.O. Box 6526
Tallahassee, FL 32314
850.222.7500

* Hold in #SI

===== STATEMENT =====

January 11, 2021

Lakeside Plantation Community Development District
9145 Narcoossee Rd, Ste. A206
Orlando, FL 32827

Bill Number 119913
Billed through 12/31/2020

General Counsel/Monthly Meeting

LPCDD 00001 SRS

310 51300 31500

FOR PROFESSIONAL SERVICES RENDERED

12/16/20	SRS	Review audit engagement letter; confer with Adams and Deary regarding amenity management; prepare for and attend board meeting; conduct follow-up regarding same.	4.70 hrs
12/16/20	ALS	Prepare for monthly board meeting.	0.40 hrs
12/17/20	SRS	Conduct meeting follow-up.	0.30 hrs
12/18/20	SRS	Prepare agreement for pool heater.	0.20 hrs
12/18/20	ALS	Prepare a short term agreement with Alex's Pool Heating & Air Conditioning.	0.40 hrs
12/30/20	MCE	Review new e-verify law and impact on district.	0.10 hrs
12/31/20	EGRE	Research application of e-verify law; prepare memorandum regarding same.	0.10 hrs
Total fees for this matter			\$1,577.00

MATTER SUMMARY

Sousa, Adriana L. - Paralegal	0.80 hrs	145 /hr	\$116.00
Gregory, Emma C.	0.10 hrs	235 /hr	\$23.50
Eckert, Michael C.	0.10 hrs	335 /hr	\$33.50
Sandy, Sarah R.	5.20 hrs	270 /hr	\$1,404.00

TOTAL FEES \$1,577.00

TOTAL CHARGES FOR THIS MATTER \$1,577.00

BILLING SUMMARY

Sousa, Adriana L. - Paralegal	0.80 hrs	145 /hr	\$116.00
Gregory, Emma C.	0.10 hrs	235 /hr	\$23.50
Eckert, Michael C.	0.10 hrs	335 /hr	\$33.50
Sandy, Sarah R.	5.20 hrs	270 /hr	\$1,404.00

=====

TOTAL FEES

\$1,577.00

TOTAL CHARGES FOR THIS BILL**\$1,577.00****Please include the bill number with your payment.**



Lakeside Plantation Community Development District
c/o Governmental Management Services
219 E Livingston St
Orlando, FL 32801

INVOICE

Customer	Lakeside Plantation Community Development District
Acct #	670
Date	09/13/2021
Customer Service	Kristina Rudez
Page	1 of 1

Payment Information	
Invoice Summary	\$ 16,501.00
Payment Amount	
Payment for:	Invoice#14331
100121675	

Thank You

Please detach and return with payment



Customer: Lakeside Plantation Community Development District

Invoice	Effective	Transaction	Description	Amount
14331	10/01/2021	Renew policy	Policy #100121675 10/01/2021-10/01/2022 Florida Insurance Alliance Package - Renew policy Due Date: 9/13/2021 360 155 100	16,501.00
				Total
				\$ 16,501.00
				Thank You
FOR PAYMENTS SENT OVERNIGHT: Egis Insurance Advisors LLC, Fifth Third Wholesale Lockbox, Lockbox #234021, 4900 W. 95th St Oaklawn, IL 60453				

Remit Payment To: Egis Insurance Advisors, LLC	(321)233-9939	Date
Lockbox 234021 PO Box 84021		09/13/2021
Chicago, IL 60689-4002	scilmer@egisadvisors.com	

GMS-Central Florida, LLC
1001 Bradford Way
Kingston, TN 37763

Invoice

Invoice #: 128
Invoice Date: 9/1/21
Due Date: 9/1/21
Case:
P.O. Number:

Bill To:
Lakeside Plantation CDD
219 E. Livingston St.
Orlando, FL 32801

Description	Hours/Qty	Rate	Amount
Management Fees - September 2021 310 513 340		3,187.17	3,187.17
Information Technology - September 2021 310 513 3510		83.33	83.33
Dissemination Agent Services - September 2021 310 513 313		83.33	83.33
Office Supplies 310 513 510		0.12	0.12
Postage 310 513 420		32.97	32.97
Copies 310 513 4250		299.55	299.55
Total			\$3,686.47
Payments/Credits			\$0.00
Balance Due			\$3,686.47

Johnson Engineering, Inc.

Remit To:

P.O. Box 2112

Fort Myers, FL 33902

Ph: 239.334.0046 Fax: 239.334.3661

Invoice

September 22, 2021

Project No: 20150050-000

Invoice No: 70

FEID #59-1173834

Project Manager Andrew Tilton

George Flint

Lakeside Plantation CDD

c/o Governmental Management Services

4648 Eagle Falls Pl

Tampa, FL 33619

Project 20150050-000 Lakeside Plantation CDD

20150050-000

Lakeside Plantation CDD

Work Authorization #3, dated 3/24/15 - Change Order No. 1, dated 11/3/15

Work Authorization #4, dated 5/27/15

Work Authorization #5, dated 5/27/15

Work Authorization #7, dated 1/26/17

Work Authorization #8, dated 9/18/18

Professional Services through September 12, 2021

310 513 311.00

PROFESSIONAL SERVICES

Phase No.	Phase Description	Contract Amount	Fee Type	%	Total Inv To-Date	Previously Invoiced	Current Inv Amount	Balance to Complete
1.	General Engineering	69,174.26	T&M	100 %	69,174.26	66,857.15	2,317.11	0.00
	Totals	69,174.26			69,174.26	66,857.15	2,317.11	0.00

SUB-TOTAL PROFESSIONAL SERVICES:

2,317.11

Unit Billing

Prints 12.0 KIP Prints @ 0.28 3.36

Total Units 3.36

INVOICE TOTAL:

2,317.11

Project	20150050-000	Lakeside Plantation CDD	Invoice	70

Summary of professional services

Phase No. / Description	Bill Hours	Bill Rate	Billable Amount
1. - General Engineering			
Engineer IV			
Burford, Brent	8/18/2021	3.50 Hrs @ 125.00	437.50
Obtain, gather and review proposals for tennis court drainage and Magnolia Circle drainage repairs. Print and prepare documents for distribution at LPCCD Board of Supervisors meeting. Revisit tennis court drainage issue to determine if there is a temporary solution to relieve the drainage. Attend LPCDD Board of Supervisors meeting.			
Burford, Brent	8/19/2021	1.25 Hrs @ 125.00	156.25
Review billing as requested by CDD supervisor Roumy. Includes reviewing timesheets, emails, and phone calls.			
Burford, Brent	8/24/2021	2.00 Hrs @ 125.00	250.00
Site visit to Magnolia Circle to inspect installation of drainage inlets during construction.			
Burford, Brent	8/24/2021	.75 Hrs @ 125.00	93.75
Completed review of billing as requested by CDD supervisor Roumy. Includes review of timesheets, emails, and phone calls.			
Burford, Brent	8/30/2021	3.00 Hrs @ 125.00	375.00
Met contractor onsite at Magnolia Circle as they complete drainage repairs. Conversation with amenities manager in regard to electrician for fountain and aeration electrical installation proposals. Email correspondence with CDD manager in regards to fountain and aeration proposals and traffic calming devices.			
Burford, Brent	9/3/2021	.25 Hrs @ 125.00	31.25
Conversation with amenities manager in regards to electrician and Lake numbering system. Emailed lake map and identity table.			
Burford, Brent	9/8/2021	3.25 Hrs @ 125.00	406.25
Review invoice from Innotech for Magnolia Circle drainage repair. Coordination with transportation team and research in regard to speed humps and recommended signage. Prepared exhibit showing recommended locations. Researched speed hump vendor and products. Researched lake numbering system exhibits and tables. Updated aerial exhibit and printed large exhibit as requested by the CDD manager. Reviewed proposal from Sergeant's Electric in regards to fountains and aeration electric service.			
Burford, Brent	9/9/2021	.50 Hrs @ 125.00	62.50
Review and mark up Scarlett Ave dog park and parking exhibits.			
Engineer IX			
Tilton, Andrew	9/7/2021	.50 Hrs @ 190.00	95.00
Meeting review			
Technician II			
Marino, Brian	9/9/2021	6.25 Hrs @ 65.00	406.25
Located and downloaded arials; Created exhibit for Dog park Parking; Created sections;			
1. - General Engineering Total	21.25		2,313.75

From: Tricia Adams tadams@gmscfl.com
Subject: Re: LSP Admin Invoices
Date: September 27, 2021 at 1:41 PM
To: Hannah Smith hsmith@gmstnn.com

TA

Approved except HGS — they are billing for an item that is not LSP. Can you send me the invoice and I will send to Sarah Sandy for corrections?

Thank you,

Tricia L. Adams

District Manager
Governmental Management Services
219 E. Livingston Street
Orlando, FL 32801

Office 407.841.5524 ext 138
Cell 863.241.8050

"It is not the mountain we conquer but ourselves."
—Edmund Hillary

On Sep 27, 2021, at 1:32 PM, Hannah Smith <hsmith@gmstnn.com> wrote:

Tricia,

See attached LSP Admin invoices for review and approval. Thanks!

****WE HAVE MOVED, PLEASE NOTE NEW OFFICE ADDRESS****

Best Wishes,
Hannah Smith
Governmental Management Services
4648 Eagle Falls Pl
Tampa, FL 33619
Phone: (813) 422-7758 ext 136

Begin forwarded message:

From: Copier@gmscfl.com
Subject: Message from KM_C360i
Date: September 27, 2021 at 2:27:49 PM EDT
To: hsmith@gmstnn.com
Reply-To: Copier@gmscfl.com

<SKM_C360i21092714270.pdf>



320 53800-47200

#000

I approved

BRADLEY A. RAY
1085 Rhineland Dr.
PORT CHARLOTTE, FL 33953
941-743-9423

Completed 9-14-21

Submitted To		Work To Be Performed At	
Name	Scarlett Plantation	Address	5 Williams
Address	800 Plantation Blvd	City, State	Port Charlotte
City, State	North Port, Fla	Number of Grading	
Phone #	941-903-5500	Date	8-19-21

We hereby propose to furnish the materials and perform the labor necessary for the completion of:

all areas below have a trip hedged to be done. If more than one area will be noted as address.

1908. Scarlett, 1921 Scarlett, 1923. Scarlett (3), 1924 Scarlett, 1925 Scarlett (2), 1936. Scarlett (4), 1963 Scarlett, 1971 Scarlett, 2016 Scarlett, 2027 Scarlett, 2030 Scarlett (2), 2031 Scarlett, 2035 Scarlett, 2072 Scarlett.

All material is guaranteed to be as specified, and the above work to be performed in accordance with the above specifications and completed in a substantial workmanlike manner. Not responsible for or damage to irrigation systems, landscaping or underground wiring. Control joints placed as needed to minimize fracturing or cracking. Total sum:

in full at completion Dollars (\$ 1998⁰⁰)

With payments as follows:

Respectfully submitted

Note: This proposal may be withdrawn by us if not accepted within 10 days

ACCEPTANCE OF PROPOSAL

The above prices, specifications and conditions are satisfactory and are hereby accepted. We are authorized to do the work as specified. Payments will be made as outlined above.

Signature _____ Date _____



SHERWIN-WILLIAMS

STATEMENT OF COMMERCIAL ACCOUNT

STATEMENT DATE: 07/31/21 PAGE: 1

CUSTOMER NUMBER : 4251-9509-6

LAKESIDE PLANTATION CDD
2200 PLANTATION BLVD
NORTH PORT, FL 34289 9472

THE SHERWIN-WILLIAMS CO.
ACCOUNTS RECEIVABLE DEPT.
2970 COMMERCE PKWY
NORTH PORT, FL 34289 8315

JOB NUMBER: 01
JOB NAME: LAKESIDE PLANTATION CDD
PAYMENT TERMS: NET 20TH PROX

DUE DATE
08/20/2021

PLEASE PAY
\$147.92

all approved

REMITTANCE ADVICE

CUSTOMER NO.

4251-9509-6

PAGE 1

JOB NUMBER : 01

702492 / 00109

LAKESIDE PLANTATION CDD
2200 PLANTATION BLVD
NORTH PORT, FL 34289 9472

PLEASE RETURN THIS REMITTANCE ADVICE WITH
YOUR PAYMENT IN THE ENCLOSED ENVELOPE

THANK YOU FOR YOUR PAYMENT

NET AMOUNT DUE: \$147.92

AMOUNT PAID	
CHECK NO.	

ACCOUNT SUMMARY

IF YOU HAVE ANY QUESTIONS CONCERNING YOUR ACCOUNT, PLEASE CALL 841-426-4909

PAST DUE AMOUNTS MUST BE PAID IMMEDIATELY

PREVIOUS BALANCE:	\$147.92	CURRENT DUE:	\$0.00
CURRENT MONTH CHARGES:	\$0.00	PAST DUE 1-30 DAYS:	\$147.92
CURRENT MONTH PAYMENTS:	\$0.00	PAST DUE 31-60 DAYS:	\$0.00
CURRENT MONTH STORE CREDITS:	\$0.00	PAST DUE 61-90 DAYS:	\$0.00
CURRENT MONTH OTHER DEBITS:	\$0.00	PAST DUE OVER 90 DAYS:	\$0.00
CURRENT MONTH OTHER CREDITS:	\$0.00	NET AMOUNT DUE:	\$147.92
ACCOUNT BALANCE	\$147.92		

ACCOUNT DETAIL

DATE	TYPE	CREDIT MEMO	STORE	REF NO	P.O. NUMBER/JOB DESC	AMOUNT	SUBTOTAL
06/24/2021	CHARGE		702492	24345		\$27.98	\$27.98
06/24/2021	CHARGE		702492	24337	FOUNTAINS	\$140.44	
06/30/2021	CHARGE		702492	26944	LAKES	\$35.46	\$175.90

PLEASE CHECKMARK
ITEMS PAID IN FULL OR
ENTER AMOUNT PAID

REF NO	AMOUNT
24345	\$27.98
24337	\$140.44
26944	\$35.46

paint
billboard library

John's Electric Motors and WaterWorld Pool Supply
3616 Tamiami Trail, Unit 1B
Port Charlotte, Florida 33952
www.johnselectricmotors.com
941-629-0240

330 S380-48108 H approved

Lakeside Plantation/attn.Tamara
2200 Plantation Boulevard
North Port, FL 34289

Exit Fountain new
motor

Invoice # 5260
Invoice Date 08-09-21
Balance Due \$1,179.90

Item	Description	Unit Cost	Quantity	Line Total
Replacement Motors	Replacement Spek Motor	\$829.95	1.0	\$829.95
Speck 20mm Shaft seal	Part # 2920343310	\$49.95	1.0	\$49.95
Service Call - Commercial	Service Charge for Commercial Call	\$150.00	2.0	\$300.00

Disclaimer

Electrical parts are final sale only and are not returnable. Items that have been installed or show evidence of installation are nonrefundable. For items that may be returned, customers may receive an in-store credit for such items that contain electrical components, a full refund for a defective item or a partial refund which may include a restocking fee equal to 15% of the total parts cost minus any collected taxes. Rebuilt motors do not carry any warranty either expressed or implied and John's Electric Motors makes no warranty as to the length of time any rebuilt motor or other electrical item may continue to function correctly, if at all. Name brand whole part items may have a factory or manufacturer's warranty, said manufacturer's policy concerning all terms of that warranty are between the purchaser and the manufacturer. Repair items whether whole parts, motors, or parts of motors, may need replacement parts due to complications of disassembly and failure of part integrity due to age or exposure and said repairs may exceed the value of a new replacement item. John's Electric Motors shall not be responsible for parts, motors or other items that fail or are otherwise damaged during disassembly or reassembly. Parts, whether electrical or otherwise, installed by the customer may not be covered by any warranty as professional installation by a licensed contractor is recommended. Special order parts who whole parts are nonrefundable.

Customer supplied parts shall not be warranted for failure of that part or, in the event that part causes damage to or failure of a whole part; John's Electric Motors shall not be responsible for any parts supplied by the customer or any damage resulting therefrom. Repair items not claimed by the customer within 30 days of being notified by phone, text or email of their completion shall be forfeit and become the sole property of John's Electric Motors and be disposed of, sold, or transferred in any way deemed appropriate by management with no recourse from and no reimbursement due the customer. John's Electric Motors is not responsible for shipping delays or price increases. The customer hereby warrants that they have read and understand these terms and conditions and by signing below, issuing payment, or completing the transaction, agree to all terms and limitations as outlined above and/or terms or conditions available pursuant to Florida law.

Subtotal \$1,179.90
Tax \$0.00
Invoice Total \$1,179.90
Payments \$0.00
Credits \$0.00
Balance Due \$1,179.90

Signed: _____

Date: _____



Innotech Construction Services, LLC

1077 Innovation Ave, Unit 112

North Port, FL 34289

(941)204-0159

innotechconstructiongroup@gmail.com

330-53800-48700

INVOICE**BILL TO**

Tamara Lorf

Lakeside Plantation

2800 Plantation Blvd

North Port, FL 33948

INVOICE # 1348**DATE** 08/02/2021**DUE DATE** 08/02/2021**TERMS** Due on receipt

DATE	ACTIVITY	DESCRIPTION	QTY	RATE	AMOUNT
07/30/2021	Mirror Installation	Anchor and Hang extra-large mirrors in exercise room. Includes fabrication and painting of wooden frame on each.	2	150.00	300.00

BALANCE DUE**\$300.00**



Fitness Logic

380 Scarlet Blvd.
Oldsmar, FL 34677

Phone #

727-784-4964

Fax #

727-784-0223

E-mail

fitlogic@aol.com

Invoice

Date	Invoice #
8/13/2021	102759

Bill To
GMS - Lakeside Plantation 9145 Narcoossee Rd Ste. A206 Orlando, FL 32827

Location/Contact/Phone
Location: Lakeside Plantation 2200 Plantation Blvd, North Port, FL 34289 Contact: Tamara Phone: 941-423-5500

P.O. Number		Terms	Rep	Work Order #	Completed
		Net 10	MAN	103130	8/12/2021
Item Code	Description	Quantity	Price Each	Amount	
Maintenance	Quarterly General Maintenance and cleaning of all equipment - Labor Only Maintenance completion during August	1	145.00	145.00	

Thank you for your business.

Invoices over 30 Days will incur 1.5% Interest per month

Subtotal \$145.00

Sales Tax (0.0%) \$0.00

Total \$145.00

DART Pool Solutions, Inc

1181 S. Sumter Blvd - PMB 324

North Port, FL 34287

800-790-3278

CPC1457408

Estimate/Quote

Date	Quote #
9/3/2021	T1325

330 53800 - 51000

Name / Address
Lakeside Plantation 2200 Plantation Blvd North Port, FL 34287

			Rep
			SB
Description	Qty	Cost	Total
to replace pool stenner pump Stenner pump, installed FL Sales Tax	1	515.00 7.00%	515.00 0.00
Thank you for your business			
Total			\$515.00

NOTE: Prices are subject to change after sixty days from date of estimate/quote.

Once approved, if order is cancelled there will be a 20% restocking fee, for the return of the equipment.

There will be a 3% charge if paying with a credit card

All parts and equipment remain property of DART Pool Solutions until paid in full.

John's Electric Motors and WaterWorld Pool Supply
3616 Tamiami Trail, Unit 1B
Port Charlotte, Florida 33952
www.johnselectricmotors.com
941-629-0240

330 S 3808 - 48103 H approved

exit fountain new exit fountain filter pump

Lakeside Plantation/attn. Tamara
2200 Plantation Boulevard
North Port, FL 34289

Invoice # 5320
Invoice Date 09-01-21
Balance Due \$497.40

Item	Description	Unit Cost	Quantity	Line Total
Speck 20mm Shaft seal	Part # 2920343310	\$49.95	1.0	\$49.95
Replacement Motors	.75 hp motor C face	\$259.95	1.0	\$259.95
Service Call - Commercial	Service Charge for Commercial Call	\$150.00	1.25	\$187.50

Subtotal	\$497.40
Tax	\$0.00
Invoice Total	\$497.40
Payments	\$0.00
Credits	\$0.00
Balance Due	\$497.40

Signed: _____

[Signature]

Date: _____

9/10/21



Innotech Construction Services, LLC

1077 Innovation Ave, Unit 112

North Port, FL 34289

(941)204-0159

innotechconstructiongroup@gmail.com

001

330

53800 - 48102

INVOICE**BILL TO**

Tamara Lorf

Lakeside Plantation

2800 Plantation Blvd

North Port, FL 33948

INVOICE # 1347**DATE** 08/02/2021**DUE DATE** 08/02/2021**TERMS** Due on receipt

DATE	ACTIVITY	DESCRIPTION	QTY	RATE	AMOUNT
07/30/2021	Parts, Labor, and Installation	Replaced toe kicks - 6	6	25.00	150.00
	Interior Door Hardware	Replaced door handle and lock with plates. Non pre-existing holes; fresh drill-out.	1	50.00	50.00
	Parts, Labor, and Installation	Replace door sweeps - 2	2	25.00	50.00

BALANCE DUE**\$250.00**

Innotech Construction Services, LLC

1077 Innovation Ave, Unit 112

North Port, FL 34289

(941)204-0159

innotechconstructiongroup@gmail.com

H approved

320 53800 - 43000

INVOICE

BILL TO

Tamara Lorf

Lakeside Plantation

2800 Plantation Blvd

North Port, FL 33948

INVOICE # 1346

DATE 08/02/2021

DUE DATE 08/02/2021

TERMS Due on receipt

DATE	ACTIVITY	DESCRIPTION	QTY	RATE	AMOUNT
07/30/2021	Plumbing	Dug out the Valve Vault by the water pit; fixed water leak behind electrical box.	1	200.00	200.00

BALANCE DUE

\$200.00

Innotech Construction Services, LLC
1077 Innovation Ave, Unit 112
North Port, FL 34289
(941) 204-0159
innotechconstructiongroup@gmail.com

330 538000-48700

INVOICE

BILL TO

Tamara Lorf
Lakeside Plantation
2800 Plantation Blvd
North Port, FL 33948

INVOICE # 1390

DATE 08/23/2021

DUE DATE 08/23/2021

TERMS Due on receipt

A/C out in gym
Emergency

DATE	ACTIVITY	DESCRIPTION	QTY	RATE	AMOUNT
08/22/2021	A/C Service and Maintenance	Weekend Emergency Service - Heating and Cooling Repair, breaker box	1	145.00	145.00

BALANCE DUE

\$145.00

53800-51000

Approved

DART Pool Solutions, Inc.

1181 S. Sumter Blvd - PMB 324

North Port, FL 34287

CPC1457408

Invoice

Date	Invoice #
9/2/2021	90016

Bill To	Service Location
Lakeside Plantation 2200 Plantation Blvd North Port, FL 34287	2200 Plantation Blvd North Port, FL 34289

P.O. No.	Terms	Due Date	Tech	Date of Service
	Net 30	10/2/2021	SB	9/2/2021

Description	Qty	Rate	Amount
Pool maintenance September		\$50.00	\$50.00
FL Sales Tax		7.00%	0.00

Thank you for your business!

A finance charge of 1.5 % will be added to all overdue accounts, with a minimum charge of \$1.50. All materials, parts and equipment will remain property of DART until paid in full.

Total	\$850.00
Payments/Credits	\$0.00
Balance Due	\$850.00

Phone	941-743-2010	Fax	941-426-7593
E-mail	Web Site		
info@dartpoolsolutions.com		www.dartpoolsolutions.com	



5824 Bee Ridge Road #165, Sarasota, FL 34233

Invoice

Date 8/28/2021 Invoice # 2021-02628

Bill To:

Lakeside Plantation CDD
c/o Governmental Management Services
219 East Livingston Street
Orlando, FL 32801

53800-46500
Approved

		Terms	Due on receipt
Description	Qty	Amount	
Service Date: 08/17/2021			
Cap heads along the basketball court prior to paver installation by another vendor			
Popup Cap	4	20.00	
Labor - Technician	1	55.00	

PAYMENT ACCEPTED: CHECK AND CREDIT CARD.

Make check payable to:
Bloomings Landscape & Turf Management, Inc.
Please include invoice number on your check.
Thank You For Your Business

Total	\$75.00
Payments/Credits	\$0.00
Balance Due	\$75.00

Phone #	Fax #	E-mail	Web Site
(941) 927-9765	(941) 929-9356	carla@bloomingslandscape.com	www.bloomingslandscape.com



5824 Bee Ridge Road #165, Sarasota, FL 34233

Invoice

Date 8/28/2021 Invoice # 2021-02629

Bill To:

Lakeside Plantation CDD
c/o Governmental Management Services
219 East Livingston Street
Orlando, FL 32801

53 800-416500

Approved

		Terms	Due on receipt
Description	Qty	Amount	
Install mulch in the plant bed behind the playground along the fence to the tennis court Coco Brown Mulch - Bag	40	200.00	

PAYMENT ACCEPTED: CHECK AND CREDIT CARD.

Make check payable to:
Bloomings Landscape & Turf Management, Inc.
Please include invoice number on your check.
Thank You For Your Business

Total \$200.00

Payments/Credits \$0.00

Balance Due \$200.00

Phone #
(941) 927-9765

Fax #
(941) 929-9356

E-mail
carla@bloomingslandscape.com

Web Site
www.bloomingslandscape.com



5524 Bee Ridge Road #165, Sarasota, FL 34233

Invoice

Date Invoice #

9/1/2021 2021-03727

Bill To:

Lakeside Plantation CDD
c/o Governmental Management Services
219 East Livingston Street
Orlando, FL 32801

53800-46400

Approved

Terms Due Date

Net 30 10/1/2021

Description	Qty	Amount
Month of September Monthly Grounds Maintenance Fee		7,655.00

PAYMENT ACCEPTED: CHECK AND CREDIT CARD.

Make check payable to:
Blooming's Landscape & Turf Management, Inc.
Please include invoice number on your check.
Thank You For Your Business

Total \$7,655.00

Payments/Credits \$0.00

Balance Due \$7,655.00

Phone #

(941) 927-9765

Fax #

(941) 929-9356

E-mail

carla@bloominglandscape.com

Web Site

www.bloominglandscape.com

Vesta

53800-12000

Approved

Invoice

Vesta Property Services, Inc.
245 Riverside Avenue
Suite 300
Jacksonville FL 32202

Invoice # 388739
Date 9/1/2021
Terms
Due Date 9/30/2021
Memo Sep 2021 Fees

Bill To
Lakeside Plantation C.D.D.
c/o Governmental Mgmt Svcs-OF, LLC
9145 Narcoossee Road, Suite A206
Orlando FL 32827

Description	Quantity	Rate	Amount
Facility Manager Services at Lakeside Plantation Amenity Center	1	5,202.00	5,202.00
Office Administrative Assistant Services at Lakeside Plantation Amenity Center	1	2,281.08	2,281.08
Facility Attendants Services at Lakeside Plantation Amenity Center	1	2,587.92	2,587.92
Facility Maintenance Services at Lakeside Plantation Amenity Center. Credit for \$3853.33 applied due to worker absence.	1	1,231.11	1,231.11
Total			\$11,302.11

53800-46000

Approved

SOLITUDE
LAKE MANAGEMENT

Voice: (888) 480-5253 Fax: (888) 358-0088

SOLD TO: Lakeside Plantation CDD
Governmental Mgmt Services-Central
9145 Narcoossee Road, Ste. A206
Orlando, FL 32827

INVOICE

Invoice Number: PI-A00670317
Invoice Date: 09/01/21

PROPERTY: Lakeside
Plantation CDD

CUSTOMER ID
L2077
Sales Rep ID
Bill Kurth

CUSTOMER PO
Shipment Method

Payment Terms
Due upon receipt
Ship Date Due Date
09/01/21

Qty Item / Description

UOM Unit Price Extension

1 Lake & Pond Management Services SVR08010
09/01/21 - 09/30/21
Lake & Pond Management Services

966.00 966.00

PLEASE REMIT PAYMENT TO:

1320 Brookwood Drive, Suite H
Little Rock, AR 72202

www.solitudelakemanagement.com

Subtotal 966.00
Sales Tax 0.00
Total Invoice 966.00
Payment Received 0.00
TOTAL 966.00

www.aeratorsaquatics4lakesnponds.com

Approved

Rapid Security Solutions, LLC

1920 Northgate Blvd. STE A9
Sarasota, FL 34234
(877) 449-7099
Fax: (941) 219-4190

Invoice

55371 8/10/2021

10087 8/10/2021

Lakeside Plantation CDD
C/O GMS-Central Florida, LLC
135 W. Central Blvd.
Suite 320
Orlando, FL 32801

Rapid Security Solutions, LLC
1920 Northgate Blvd. STE A9
Sarasota, FL 34234

\$257.50

Lakeside Plantation CDD 10087 8/10/2021 8/10/2021

Lakeside Plantation CDD, 2200 Plantation Drive, Northport, FL

1.00	1st Hour of Service Labor	115.00	115.00
1.50	Service Labor	95.00	142.50

Subtotal: **\$257.50**

Tax 0.00

Payments/Credits Applied 0.00

Invoice Balance Due: **\$257.50**

For RSS Service Call: 941.219.4190, Select Opt # 2

8/10/2021	55371	System Service (56590)	\$257.50	\$257.50



53800-418401
Approved

INVOICE

2

Relion Solutions LLC.
21378 Glendale Ave.
Port Charlotte, FL. 33952

Date: Sep 22, 2021

Balance Due: \$9,240.00

Bill To:

Lakeside Plantation CDD
135 W. Central Ave. Suite 320
Orlando, FL. 32801

Item	Quantity	Rate	Amount
May 2021	104	\$17.50	\$1,820.00
June 2021	112	\$17.50	\$1,960.00
July 2021	96	\$17.50	\$1,680.00
August 2021	112	\$17.50	\$1,960.00
September 2021	104	\$17.50	\$1,820.00
September 29th 2021 - Complimentary closing of a party.	2	\$0.00	\$0.00

Subtotal: \$9,240.00

Tax (0%): \$0.00

Total: \$9,240.00

Notes:

Guard services for Lakeside Plantation.

CHECK DATE	VEND#	INVOICE..... DATE INVOICE	...EXPENSED TO... YRMO DPT ACCT# SUB	SUBCLASS	VENDOR NAME	STATUS	AMOUNT	CHECK..... AMOUNT #
9/08/21	00046	8/31/21 1405 CEILING	202108 600-53800-48103 COMDOR DEP		INNOTECH CONSTRUCTION SERVICES, LLC	*	14,750.00	14,750.00 000120
9/08/21	00047	8/23/21 SS12522- DEPOSIT	202108 600-53800-48103		SYMBIONT SERVICE CORP.	*	8,423.00	8,423.00 000121
TOTAL FOR BANK C							23,173.00	
TOTAL FOR REGISTER							23,173.00	

LKSD LAKESIDE PLANT HSMITH

Symbiont Service Corp.

4372 North Access Road, Englewood, Florida 34224

941.474.9306 • 800.881.4328 • Fax 941.473.9306

"One Company, One Call, Complete Comfort"



Request for Deposit

DATE	JOB #
8/23/2021	SS12522-D

PROPOSAL SUBMITTED TO:

Lakeside Plantation
c/o Governmental Management Services
219 E. Livingston St.
Orlando, FL 32801

JOB NAME:

Lakeside Plantation
2200 Plantation Blvd.
North Port, FL 34289

Customer Contact	Customer Phone
Tamara T Lorf	9414235500

Customer Alt. Contact	Customer Alt. Phone

QTY	DESCRIPTION	TOTAL
	\$8,423.00 Deposit with Order [Order Total = \$28,076.00] 031 600 538 48103	8,423.00
DEPOSIT TOTAL		\$8,423.00

Symbiont Service Corp.

Go Green • Go GeoThermal

4372 North Access Road, Englewood, Florida 34224
941.474.9306 • 800.881.4326 • Fax 941.473.9306
GeoThermalFlorida.com • info@SymbiontService.com

Pool Heating • Air Conditioning

"One Company, One Call, Complete Comfort!"



POOL/SPA HEATING/COOLING PROPOSAL

Lic #: CAC035549 • EC0002946
CBC1258380 • CPC1456477

Proposal Submitted To:

Lakeside Plantation CDD
c/o Governmental Management Services
219 E. Livingston Street
Orlando, Florida 32801

Job Name:

Date: August 11, 2021

Lakeside Plantation
2800 Plantation Boulevard
North Port, Florida 34289

We hereby submit specifications and estimates for:

Replace Three Heaters with new PH-090-T Symbiont Pool Heaters:

3 Symbiont Model PH-090-T-RV GeoThermal Pool Heat/Cool Units
Includes titanium condenser heat exchangers

Source Water: From existing lake pump & piping, if adequate

Electric: Wire from existing panel, if adequate

Service Invoice # 116788 for \$98.00 is included in this proposal

Complete* installation

\$ 28,076.00

* Local permits additional as required.

Manufacturer's Limited Warranty:

One year Symbiont Service Corp. all parts and labor on the installation.

Five year manufacturer's labor on the new Symbiont units.

Seven year manufacturer's all parts only on the new Symbiont units.

Lifetime parts on titanium tube portion of the condenser heat exchangers in new units.

Not responsible for any damage to private or public unmarked underground lines, or repairs of landscape, painted or finished surfaces. All work done to code. All current discounts and promotions have been applied.

The labor, material and equipment required for this job will be furnished by Symbiont Service Corporation ("Symbiont") for a total of:
Twenty-eight thousand seventy-six dollars and no/100 **\$28,076.00**

\$8,423.00 Deposit With Order - Balance Upon Completion

Any alteration or deviation from the above scope of work involving extra costs will become an extra charge in addition to the quoted price based on time and materials pricing. Our workers are fully covered by Workmen's Compensation Insurance. This contract consists of this proposal as well as the terms and conditions, all documents and exhibits referenced therein and the Limited Workmanship Warranty, all of which are hereby incorporated by reference. This proposal will be subject to withdrawal if not accepted within 30 days. Please make checks payable to "Symbiont Service Corporation".

I HAVE READ AND UNDERSTAND THIS PROPOSAL, THE TERMS AND CONDITIONS AND ALL DOCUMENTS AND EXHIBITS REFERENCED THEREIN AND AGREE TO BE BOUND BY THEIR TERMS.

ACCEPTANCE OF PROPOSAL: The above prices, specifications and conditions are satisfactory and are hereby accepted. Symbiont is authorized to do the work as specified. By signing below, Customer acknowledges that Customer is the owner of the property where work is to be performed.

Customer: Tamara Loft
(print name)
Signature: [Signature]
Date: 8/19/2021

Respectfully submitted,

SYMBIONT SERVICE CORPORATION

By: Patrick Monde

deposit \$8423

From: Tamara T. Lorf tlorf@vestapropertyservices.com 
Subject: Pool heaters
Date: August 19, 2021 at 12:30 PM
To: Hannah Smith (hsmith@gmstnn.com) hsmith@gmstnn.com
Cc: tadams@gmscfl.com

Good afternoon,

Attached is the signed approved proposal from Symbiont, the do require an \$8,423.00 deposit.

Please let me know if there anything else you need from me.

Kind regards,

Tamara Lorf

Amenities Manager



2800 Plantation Boulevard

North Port, FL 34289

Phone: 941.423.5500

Fax: 941.423.5501

Email: tlorf@vestapropertyservices.com

www.VestaPropertyServices.com

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From: Lakeside Plantation Office Staff [<mailto:lakesideplantation@verizon.net>]
Sent: Thursday, August 19, 2021 12:09 PM
To: Tamara T. Lorf
Subject:



CCF_000296.pdf

f

Innotech Construction Services, LLC

1077 Innovation Ave, Unit 112
North Port, FL 34289
(941) 204-0159
innotechconstructiongroup@gmail.com

INVOICE

BILL TO
Tamara Lorf
Lakeside Plantation
2800 Plantation Blvd
North Port, FL 33948

31 000 538 48103

INVOICE 1405
DATE 08/31/2021
TERMS Due on receipt
DUE DATE 08/31/2021

PAYMENT TERMS
50/50

Ceiling Corridor dep

DATE	ACTIVITY	DESCRIPTION	QTY	RATE	AMOUNT
	Sales	✱Corridor Ceiling Installation - Side Flanking Section - 48 Linear Feet per section; 48'x10' total coverage area per section.	1	6,375.00	6,375.00
	General Labor	Remove all vinyl soffit from corridor ceilings.	0.50	0.00	0.00
	Parts, Labor, and Installation	Install 2'x4' wood purlin bracing on every 24" centers spanning the entirety of the ceiling length.	0.50	0.00	0.00
	General Labor	Reinstall vinyl soffit previously removed back to correct application specifications.	0.50	0.00	0.00
	Sales	Corridor Ceiling Installation - Front and Back Section - 102 Linear Feet per section; 102'x10' total coverage area per section.	1	8,375.00	8,375.00
	General Labor	Remove all vinyl soffit from corridor ceilings.	0.50	0.00	0.00
	Parts, Labor, and Installation	Install 2'x4' wood purlin bracing on every 24" centers spanning the	0.50	0.00	0.00

	entirety of the ceiling length.			
General Labor	Reinstall vinyl soffit previously removed back to correct application specifications.	0.50	0.00	0.00

BALANCE DUE **\$14,750.00**

Estimate Summary

Estimate 1019	29,500.00
This invoice 1405	\$14,750.00
Total invoiced	14,750.00

From: Tricia Adams tadams@gmscfl.com
Subject: Re: Invoice 1405 from Innotechconstructiongroup@gmail.com's Company
Date: August 31, 2021 at 4:02 PM
To: Tamara T. Lorf tlorf@vestapropertyservices.com, Tamara Lorf manager@lakesideplantationcdd.com
Cc: Hannah Smith hsmith@gmstnn.com

Tamara,

It is fine to facilitate a deposit but make sure we have a signed agreement from them (I sent to you under separate cover today).

Thank you,

Tricia L. Adams

District Manager
Governmental Management Services
219 E. Livingston Street
Orlando, FL 32801

Office 407.841.5524 ext 138
Cell 883.241.8050

"It is not the mountain we conquer but ourselves."
— Edmund Hillary

On Aug 31, 2021, at 2:59 PM, Tamara T. Lorf <tlorf@vestapropertyservices.com> wrote:

Hello Tricia,

The invoice attached is for the ceiling corridor, and they are asking for a deposit for the materials needed.

Please let me know.

Kind regards,

Tamara

From: Innotech Construction Services, LLC <innotechconstructiongroup@gmail.com>
Sent: Tuesday, August 31, 2021 11:44 AM
To: Tamara T. Lorf <tlorf@vestapropertyservices.com>
Subject: Invoice 1405 from [Innotechconstructiongroup@gmail.com](mailto:innotechconstructiongroup@gmail.com)'s Company

INVOICE 1405

Innotech Construction Services, LLC

DUE 08/31/2021

\$14,750.00

Review and pay

Powered by QuickBooks

Dear Tamara Lorf,

Here's your invoice! Justin said he spoke to you about a deposit for this job since it is large. Typically with your CDD we do COC, but we need to do 50/50 on these big ones for materials acquisition.

Have a great day,
[Innotechconstructiongroup@gmail.com](mailto:innotechconstructiongroup@gmail.com)'s Company

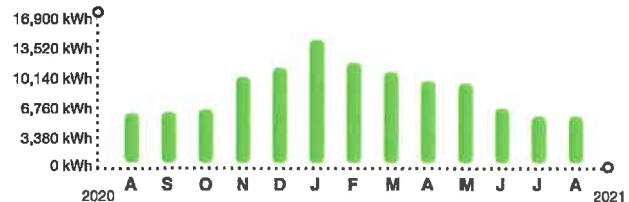
Innotech Construction Services, LLC
1077 Innovation Ave. Unit 112 North Dade, FL 33280

**Electric Bill Statement****For:** Jul 24, 2021 to Aug 25, 2021 (32 days)**Statement Date:** Aug 25, 2021**Account Number:** 84595-15071**Service Address:**2800 PLANTATION BLVD #POOL & TENNIS
NORTH PORT, FL 34289**LAKESIDE PLANTATION COMM DEVELOPMENT DIST,**
Here's what you owe for this billing period.**CURRENT BILL****\$613.99**

TOTAL AMOUNT YOU OWE

Sep 15, 2021

NEW CHARGES DUE BY

ENERGY USAGE HISTORY**BILL SUMMARY**

Amount of your last bill	675.44
Payments received	-675.44
Balance before new charges	0.00
Total new charges	613.99
Total amount you owe	\$613.99
FPL automatic bill pay - DO NOT PAY	

(See page 2 for bill details.)

KEEP IN MIND

- Payment received after November 15, 2021 is considered LATE; a late payment charge of 1% will apply.
- The amount due on your account will be drafted automatically on or after September 05, 2021. If a partial payment is received before this date, only the remaining balance due on your account will be drafted automatically.

Customer Service: 1-800-375-2434
Outside Florida: 1-800-226-3545Report Power Outages: 1-800-4OUTAGE (468-8243)
Hearing/Speech Impaired: 711 (Relay Service)

/ 3* FPL AUTOMATIC BILL PAY - DO NOT PAY *

LAKESIDE PLANTATION COMM
DEVELOPMENT DIST
ATTN LAKESIDE PLANTATION COMMUNITY
9145 NARCOOSSEE RD # A206
ORLANDO FL 32827-5768The amount enclosed includes
the following donation:
FPL Care To Share: _____Make check payable to FPL
in U.S. funds and mail along with
this coupon to:FPL
GENERAL MAIL FACILITY
MIAMI FL 33188-0001Visit [FPL.com/PayBill](https://www.fpl.com/PayBill)
for ways to pay.84595-15071
ACCOUNT NUMBER\$613.99
TOTAL AMOUNT YOU OWESep 15, 2021
NEW CHARGES DUE BY\$ Auto pay - DO NOT PAY
AMOUNT ENCLOSED



Customer Name:
LAKESIDE PLANTATION
COMM DEVELOPMENT
DIST

Account Number:
84595-15071

FPL.com Page 2

E001

BILL DETAILS

Amount of your last bill	675.44
Payment received - Thank you	-675.44
Balance before new charges	\$0.00

New Charges

Rate: GSD-1 GENERAL SERVICE DEMAND

Customer charge:	\$26.48
Non-fuel: (\$0.023540 per kWh)	\$136.39
Fuel: (\$0.028360 per kWh)	\$164.32
Demand: (\$11.30 per KW)	\$237.30

Electric service amount 564.49

Gross receipts tax 14.47

Franchise charge 35.03

Taxes and charges 49.50

Total new charges \$613.99

Total amount you owe \$613.99

FPL automatic bill pay - DO NOT PAY

METER SUMMARY

Meter reading - Meter KL84533. Next meter reading Sep 24, 2021.

Usage Type	Current	-	Previous	=	Usage
kWh used	81530		75736		5794
Demand KW	21.43				21

ENERGY USAGE COMPARISON

	This Month	Last Month	Last Year
Service to	Aug 25, 2021	Jul 24, 2021	Aug 25, 2020
kWh Used	5794	5794	6108
Service days	32	31	32
kWh/day	181	186	190
Amount	\$613.99	\$675.44	\$576.54

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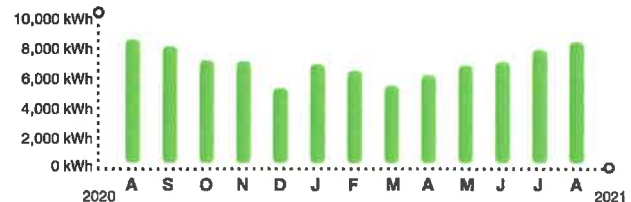
When you pay by check, you authorize FPL to process your payment electronically or as a draft. If your payment is processed electronically, your checking account may be debited on the same day we receive the check and your check will not be returned with your checking account statement. FPL does not agree to any restrictions, conditions or endorsements placed on any bill statement or payments such as check, money order or other forms of payment. We will process the payment as if these restrictions or conditions do not exist.

**Electric Bill Statement****For:** Jul 24, 2021 to Aug 25, 2021 (32 days)**Statement Date:** Aug 25, 2021**Account Number:** 57421-67439**Service Address:**2800 PLANTATION BLVD # CLBHSE
NORTH PORT, FL 34289**LAKESIDE PLANTATION COMM DEVELOPMENT DIST,**
Here's what you owe for this billing period.**CURRENT BILL****\$1,158.06**

TOTAL AMOUNT YOU OWE

Sep 15, 2021

NEW CHARGES DUE BY

Have \$944.18 withdrawn
instead of \$1,158.06.
Enroll in FPL Budget
Billing®.
FPL.com/AutoBB**ENERGY USAGE HISTORY****BILL SUMMARY**

Amount of your last bill	1,138.17
Payments received	-1,138.17
Balance before new charges	0.00
Total new charges	1,158.06
Total amount you owe	\$1,158.06

FPL automatic bill pay - DO NOT PAY

(See page 2 for bill details.)

KEEP IN MIND

- Enroll in FPL Budget Billing and have Automatic Bill Pay debit \$944.18 instead of \$1,158.06 on your next withdrawal date. Your monthly bills will become predictable year-round. Enroll at FPL.com/AutoBB
- Payment received after November 15, 2021 is considered LATE; a late payment charge of 1% will apply.
- The amount due on your account will be drafted automatically on or after September 05, 2021. If a partial payment is received before this date, only the remaining balance due on your account will be drafted automatically.

Customer Service: 1-800-375-2434
Outside Florida: 1-800-226-3545Report Power Outages: 1-800-4OUTAGE (468-8243)
Hearing/Speech Impaired: 711 (Relay Service)

/ 3* FPL AUTOMATIC BILL PAY - DO NOT PAY *

LAKESIDE PLANTATION COMM
DEVELOPMENT DIST
ATTN LAKESIDE PLANTATION COMMUNITY
9145 NARCOOSSEE RD # A206
ORLANDO FL 32827-5768The amount enclosed includes
the following donation:
FPL Care To Share: _____Make check payable to FPL.
In U.S. funds and mail along with
this coupon to:FPL
GENERAL MAIL FACILITY
MIAMI FL 33188-0001Visit FPL.com/PayBill
for ways to pay.

57421-67439

ACCOUNT NUMBER

\$1,158.06

TOTAL AMOUNT YOU OWE

Sep 15, 2021

NEW CHARGES DUE BY

\$ Auto pay - DO NOT PAY

AMOUNT ENCLOSED



Customer Name:
LAKESIDE PLANTATION
COMM DEVELOPMENT
DIST

Account Number:
57421-67439

FPL.com Page 2

E001

BILL DETAILS

Amount of your last bill	1,138.17
Payment received - Thank you	-1,138.17
Balance before new charges	\$0.00

New Charges

Rate: GSD-1 GENERAL SERVICE DEMAND

Customer charge:	\$26.48
Non-fuel: (\$0.023540 per kWh)	\$209.51
Fuel: (\$0.028360 per kWh)	\$252.40
Demand: (\$11.30 per KW)	\$576.30

Electric service amount 1,064.69

Gross receipts tax 27.30

Franchise charge 66.07

Taxes and charges 93.37

Total new charges \$1,158.06

Total amount you owe \$1,158.06

FPL automatic bill pay - DO NOT PAY

METER SUMMARY

Meter reading - Meter KLL2846. Next meter reading Sep 24, 2021.

Usage Type	Current	-	Previous	x	Const	=	Usage
kWh used	74524		73634		10		8900
Demand KW	5.12				10.00		51

ENERGY USAGE COMPARISON

	This Month	Last Month	Last Year
Service to	Aug 25, 2021	Jul 24, 2021	Aug 25, 2020
kWh Used	8900	8330	9080
Service days	32	31	32
kWh/day	278	268	283
Amount	\$1,158.06	\$1,138.17	\$773.23

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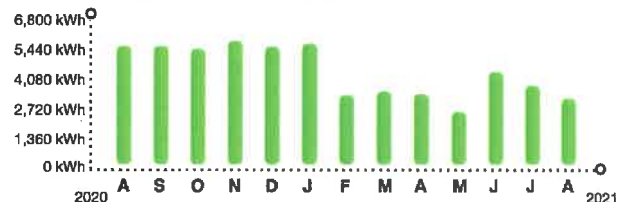
When you pay by check, you authorize FPL to process your payment electronically or as a draft. If your payment is processed electronically, your checking account may be debited on the same day we receive the check and your check will not be returned with your checking account statement. FPL does not agree to any restrictions, conditions or endorsements placed on any bill statement or payments such as check, money order or other forms of payment. We will process the payment as if these restrictions or conditions do not exist.

**Electric Bill Statement****For:** Jul 24, 2021 to Aug 25, 2021 (32 days)**Statement Date:** Aug 25, 2021**Account Number:** 04126-05586**Service Address:**2800 PLANTATION BLVD # FNTN
NORTH PORT, FL 34289**LAKESIDE PLANTATION COMMUNITY DEVELOPMENT DIST,**
Here's what you owe for this billing period.**CURRENT BILL****\$349.31**

TOTAL AMOUNT YOU OWE

Sep 15, 2021

NEW CHARGES DUE BY

ENERGY USAGE HISTORY**BILL SUMMARY**

Amount of your last bill	414.71
Payments received	-414.71
Balance before new charges	0.00

Total new charges	349.31
Total amount you owe	\$349.31

FPL automatic bill pay - DO NOT PAY

(See page 2 for bill details.)

KEEP IN MIND

- Payment received after November 15, 2021 is considered LATE; a late payment charge of 1% will apply.
- The amount due on your account will be drafted automatically on or after September 05, 2021. If a partial payment is received before this date, only the remaining balance due on your account will be drafted automatically.

Customer Service: 1-800-375-2434
Outside Florida: 1-800-226-3545Report Power Outages: 1-800-4OUTAGE (468-8243)
Hearing/Speech Impaired: 711 (Relay Service)

/ 3* FPL AUTOMATIC BILL PAY - DO NOT PAY *

LAKESIDE PLANTATION
COMMUNITY DEVELOPMENT DIST
ATTN LAKESIDE PLANTATION COMMUNITY
9145 NARCOOSSEE RD # A206
ORLANDO FL 32827-5768The amount enclosed includes
the following donation:
FPL Care To Share: _____Make check payable to FPL
in U.S. funds and mail along with
this coupon to:FPL
GENERAL MAIL FACILITY
MIAMI FL 33188-0001Visit [FPL.com/PayBill](https://www.fpl.com/PayBill)
for ways to pay.

04126-05586

ACCOUNT NUMBER

\$349.31

TOTAL AMOUNT YOU OWE

Sep 15, 2021

NEW CHARGES DUE BY

\$ Auto pay - DO NOT PAY

AMOUNT ENCLOSED



Customer Name: LAKESIDE PLANTATION
COMMUNITY
DEVELOPMENT DIST

Account Number: 04126-05586

FPL.com Page 2

E001

BILL DETAILS

Amount of your last bill	414.71
Payment received - Thank you	-414.71
Balance before new charges	\$0.00

New Charges

Rate: GS-1 GENERAL SVC NON-DEMAND / BUSINESS

Customer charge: \$10.61

Non-fuel: (\$0.065570 per kWh) \$216.78

Fuel: (\$0.028360 per kWh) \$93.76

Electric service amount 321.15

Gross receipts tax 8.23

Franchise charge 19.93

Taxes and charges 28.16

Total new charges \$349.31

Total amount you owe \$349.31

FPL automatic bill pay - DO NOT PAY

METER SUMMARY

Meter reading - Meter KN46183. Next meter reading Sep 24, 2021.

Usage Type	Current	-	Previous	=	Usage
kWh used	75367		72061		3306

ENERGY USAGE COMPARISON

	This Month Aug 25, 2021	Last Month Jul 24, 2021	Last Year Aug 25, 2020
Service to			
kWh Used	3306	3946	5908
Service days	32	31	32
kWh/day	103	127	184
Amount	\$349.31	\$414.71	\$573.38

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North Port Utilities

941-429-7122
4970 City Hall Blvd
North Port, FL 34286

SERVICE ADDRESS			
2800 PLANTATION BLVD			
ACCOUNT NUMBER	CYCLE	BILL DATE	DUE DATE
43123-156052	18-29	8/27/2021	9/17/2021

Total Current Charges	166.08
Balance Forward	0.00
Total Amount Due	166.08

LAKESIDE PLANTATION COMM DEV
9145 NARCOOSSEE RD STE A206

ORLANDO FL 32827-5768

000043123000156052000000166087

1 LAKE Please return this portion with payment. *Thank You.*

SERVICE ADDRESS 2800 PLANTATION BLVD

*** CYCLE BILL - AUTO PA ***

ACCOUNT NUMBER	CYCLE	BILL DATE	DUE DATE
43123-156052	18-29	8/27/2021	9/17/2021

Last Bill Amount	144.32
Payments	-144.32
Adjustments	0.00
Balance Forward	0.00

Rate Class: COMMERCIAL

Last payment amount/date: 144.32 8/17/2021

Service Period		Days	Meter Number	Mult	Units	Current	Previous	Usage
WA	7/20/21 8/19/21	30	54830746	1.000	TGAL	37	33	4
						USAGE FOR		4

Service	Consumption	Charge	Total
WA Base facility chg		47.29	0.00
WA Usage block 1	4.00	17.32	0.00
TOTAL WATER			64.61
SE Base facility chg		75.27	0.00
SE Consumption	4.00	26.20	0.00
TOTAL SEWER			101.47

Total Current Charges	166.08
Balance Forward	0.00
Total Amount Due	166.08

Lightning 30/30 rule: If it takes less than 30 sec

to hear thunder after seeing the flash, lightning

is near enough to pose a threat; after the storm

ends, wait 30 min. before resuming outdoor

North Port Utilities

941-429-7122
4970 City Hall Blvd
North Port, FL 34286

SERVICE ADDRESS			
2800 PLANTATION BLVD			
ACCOUNT NUMBER	CYCLE	BILL DATE	DUE DATE
43123-154656	18-29	8/27/2021	9/17/2021

Total Current Charges	381.61
Balance Forward	0.00
Total Amount Due	381.61

LAKESIDE PLANTATION COMM DEV
9145 NARCOOSSEE RD STE A206

ORLANDO FL 32827-5768

000043123000154656000000381610

1 LAKE Please return this portion with payment. *Thank You.*

SERVICE ADDRESS 2800 PLANTATION BLVD

*** CYCLE BILL - AUTO PA ***

ACCOUNT NUMBER	CYCLE	BILL DATE	DUE DATE	Last Bill Amount	
43123-154656	18-29	8/27/2021	9/17/2021	317.77	
				Payments	-317.77
				Adjustments	0.00
				Balance Forward	0.00
Rate Class: COMMERCIAL					
Last payment amount/date:		317.77	8/17/2021		

Service Period			Days	Meter Number	Mult	Units	Current	Previous	Usage
WA	7/20/21	8/19/21	30	80005382	1.000	TGAL	4330	4282	48
							USAGE FOR		48

Service	Consumption	Charge	Total
WA Base facility chg		92.25	0.00
WA Usage block 1	20.00	86.60	0.00
WA Usage block 2	20.00	129.80	0.00
WA Usage block 3	8.00	72.96	0.00
TOTAL WATER			381.61

Total Current Charges	381.61
Balance Forward	0.00
Total Amount Due	381.61

Lightning 30/30 rule: If it takes less than 30 sec

to hear thunder after seeing the flash, lightning

is near enough to pose a threat; after the storm

ends, wait 30 min. before resuming outdoor

North Port Utilities

941-429-7122
4970 City Hall Blvd
North Port, FL 34286

SERVICE ADDRESS			
2800 PLANTATION BLVD SWD			
ACCOUNT NUMBER	CYCLE	BILL DATE	DUE DATE
54883-159826	55-55	9/02/2021	10/01/2021

Total Current Charges	168.47
Balance Forward	0.00
Total Amount Due	168.47

LAKESIDE PLANTATION CDD
C/O GOVERNMENTAL MGT SVCS-CF
9145 NARCOOSSEE RD STE A206
ORLANDO FL 32827-5768

000054883000159826000000168479

1

Please return this portion with payment. *Thank You.*

SERVICE ADDRESS 2800 PLANTATION BLVD SWD

ACCOUNT NUMBER	CYCLE	BILL DATE	DUE DATE
54883-159826	55-55	9/02/2021	10/01/2021

Last Bill Amount	673.88
Payments	-680.56
Adjustments	0.00
Balance Forward	0.00

Rate Class: COMMERCIAL WASTE

Last payment amount/date: 680.56 8/12/2021

Service Period	Days	Meter Number	Mult	Units	Current	Previous	Usage

Service	Consumption	Charge	Total
GB DUMPSTER4YD/1 PICKUP	7/31/21 8/31/21	156.80	0.00
GB 95 GAL RECY 1PU 1MON	7/31/21 8/31/21	7.00	0.00
GB EXTRA RECY 1XMONTH	7/31/21 8/31/21	4.67	0.00
TOTAL COMMERCIAL GARBAGE			168.47

Total Current Charges	168.47
Balance Forward	0.00
Total Amount Due	168.47

Deposit Amount : 505.41

Install smoke alarms on every level of your home,

inside bedrooms & outside sleeping areas. Choose

the right smoke alarm for your needs & verify it

meets newest UL217 & UL268 standards.

Click2Gov Internet PIN#:

Average cost per day
Budget Difference

5.43
0.00



ACCOUNT INVOICE

peoplesgas.com



Statement Date: 08/19/2021

Account: 211014212750

LAKESIDE PLANTATION COMMUNITY DEV
C/O STE A206
2200 PLANTATION BLVD
NORTH PORT, FL 34289-9472

Current month's charges:	\$16.07
Total amount due:	\$16.07
Payment Due By:	09/09/2021

Your Account Summary

Previous Amount Due	\$16.07
Payment(s) Received Since Last Statement	-\$16.07
Current Month's Charges	\$16.07
Total Amount Due	\$16.07

DO NOT PAY. Your account will be drafted on 09/09/2021

One Less Worry :)

Paperless Billing -
Contact free;
worry free!

Sign up for free today!



peoplesgas.com/paperless

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

Thank you. Again.

For the eighth consecutive year, we are proud to be recognized one of the Most Trusted Brands in the nation, according to the 2021 Cogent Syndicated Utility Trusted Brand & Customer Engagement: Residential study.

peoplesgas.com/news



2021
MOST
TRUSTED
BRAND
RESIDENTIAL CUSTOMERS

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



WAYS TO PAY YOUR BILL



See reverse side for more information

Account: 211014212750

Current month's charges:	\$16.07
Total amount due:	\$16.07
Payment Due By:	09/09/2021

Amount Enclosed \$ _____

620519436849 DO NOT PAY, YOUR ACCOUNT WILL BE DRAFTED ON 09/09/2021

LAKESIDE PLANTATION COMMUNITY DEV
C/O STE A206
9145 NARCOOSSEE RD, STE 206
ORLANDO, FL 32827-5768

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

620519436849 DO NOT PAY, YOUR ACCOUNT WILL BE DRAFTED ON 09/09/2021



ACCOUNT INVOICE



Account: 211014212750
Statement Date: 08/19/2021
Current month's charges due 09/09/2021

Details of Current Month's Charges – Service from - 07/17/2021 to 08/16/2021

Service for: 2200 PLANTATION BLVD, NORTH PORT, FL 34289-9472

Rate Schedule: Residential Service RS-1

Meter Location: *pool*

Meter Number	Read Date	Current Reading	-	Previous Reading	=	Measured Volume	x	BTU	x	Conversion	=	Total Used	Billing Period
RHE73410	08/16/2021	405		405		0 CCF		1.043		1.0000		0.0 Therms	31 Days

Customer Charge

\$15.10

Natural Gas Service Cost

\$15.10

Franchise Fee

\$0.97

Total Natural Gas Cost, Local Fees and Taxes

\$16.07

Total Current Month's Charges

\$16.07

Peoples Gas Usage History

Therms Per Day
(Average)

AUG 2021 0.0
 JUL 0.0
 JUN 0.0
 MAY 0.0
 APR 0.0
 MAR 0.0
 FEB 0.0
 JAN 0.0
 DEC 0.0
 NOV 0.0
 OCT 0.0
 SEP 0.0
 AUG 2020 0.0

Important Messages

We've noticed that you have been paying your bill electronically lately. To help cut down on clutter and waste, we are no longer including a remittance envelope with your bill. Should you want to mail in your payment, you can request a payment envelope by calling 813-223-0800 or simply use a regular envelope and address it to TECO P.O. Box 31318, Tampa, Florida 33631-3318.

Hello Lakeside Plantation,

Thanks for choosing Comcast Business.

Your bill at a glance

For 2800 PLANTATION BLVD, NORTH PORT, FL, 34289-9472

Previous balance		\$315.99
Payments		\$0.00
Balance forward due now		\$315.99
Regular monthly charges	Page 3	\$287.70
One-time charges	Page 3	\$10.00
Taxes, fees and other charges	Page 3	\$28.29
New charges due Sep 11, 2021		\$325.99

Amount due \$641.98

! Your account is past due

Your account is past due, so you may have been charged a late fee of \$10.00. To keep your account current, please pay the balance forward immediately.

Need help?

Visit business.comcast.com/help or see page 2 for other ways to contact us.

Your bill explained

- Your one-time charges are \$10.00 due to Late Fee charge(s).
- Any payments received or account activity after Aug 21, 2021 will show up on your next bill. View your most up-to-date account balance at business.comcast.com/myaccount.
- This page gives you a quick summary of your monthly bill. A detailed breakdown of your charges begins on page 3.

Detach the bottom portion of this bill and enclose with your payment

Please write your account number on your check or money order

Do not include correspondence with payment

**COMCAST
BUSINESS**

141 NW 16TH ST
POMPANO BEACH FL 33060-5250

LAKESIDE PLANTATION
ATTN LAKESIDE PLANTATION
219 E LIVINGSTON ST
ORLANDO, FL 32801-1508

Account number **8535 10 055 0624394**

Balance forward due now \$315.99

New charges due Sep 11, 2021 **\$325.99**

Total amount due \$641.98

Amount enclosed

\$

Make checks payable to Comcast
Do not send cash

Send payment to

COMCAST
PO BOX 71211
CHARLOTTE NC 28272-1211

853510055062439400641985

Regular monthly charges		\$287.70
Comcast Business		\$214.95
Packaged services		\$364.90
Mobility Voice Line	\$50.00	
Business Voice		
Qty 2 @ \$25.00 each		
📶 Data, security edge, voice	\$314.90	
Package Includes: Business Internet 200 With Mobility Voice and Security edge		
Discounts		-\$194.90
Promotional Discount	-\$194.90	
Comcast Business services		\$44.95
TV Select	\$39.95	
Business Video		
Voice Mail Service	\$5.00	
Equipment & services		\$48.30
Equipment Fee	\$18.45	
Voice		
TV Box + Remote	\$9.95	
Service To Additional TV	\$19.90	
With TV Box and Remote.		
Qty 2 @ \$9.95 each		
Service fees		\$24.45
Directory Listing Management Fee	\$2.00	
Voice Network Investment	\$3.00	
Broadcast TV Fee	\$19.45	
One-time charges		\$10.00
Other charges		\$10.00
Late Fee	Aug 21	\$10.00
Taxes, fees and other charges		\$28.29
Other charges		\$3.64
Federal Universal Service Fund	\$1.63	
Regulatory Cost Recovery	\$2.01	
Taxes & government fees		\$24.65
Sales Tax	\$2.37	
State Communications Services Tax	\$11.40	
Local Communications Services Tax	\$9.68	

What's included?

**Internet:** Fast, reliable internet on our Gig-speed network**TV:** Keep your employees informed and customers entertained**Voice Numbers:** (941)423-5500, (941)423-5501, (941)888-2074Visit business.comcast.com/myaccount for more details

You've saved \$194.90 this month with your promotional discount.

continues...



State of Florida Department of Revenue

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Original Return

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Cancellations must be done before 5:00 p.m. ET on the submission date. If the submission is completed after 5:00 p.m. ET on the submission date, weekend, or holiday the cancellation must be done before 5:00 p.m. ET the next business day. All cancellations are permanently deleted from our database.

Access Source: 68-8015405857-5**Confirmation Number: 210825876054**

DR-15

Certificate Number

Collection Period

Confirm Date and Time

68-8015405857-5

07/2021

08/25/2021 11:42:23 AM ET

Location Address

2200 PLANTATION BLVD
NORTH PORT, FL 34289-9472

LAKESIDE PLANTATION COMMUNITY
DEVELOPMEN
219 E LIVINGSTON ST
ORLANDO, FL 32801-1508

Contact Information

Name

Hannah Smith

Phone

(813) 422 - 7758

Email

hsmith@gmstnn.com

Debit Date:	8/26/2021
Amount for Check:	\$70.42
Bank Routing Number:	263191387
Bank Account Number:	1100002235372
Bank Account Type:	Checking
Corporate/Personal:	Corporate
Name on Bank Account:	Lakeside Plantation CD

Due to federal security requirements, we can not process international ACH transactions. If any portion of the money used in the payment you may be making today came from a financial institution located outside of the US or its territories for the purpose of funding this payment, please do not proceed and contact the Florida Department of Revenue at 850-488-6800 to make other payment arrangements. By continuing, you are confirming that this payment is not an international ACH transaction. If you are unsure, please contact your financial institution.

I hereby authorize the Department of Revenue to process this ACH transaction and to debit the checking account identified above. I understand there may be service charges assessed on any transactions not honored by my bank.

Signature:	Hannah Smith
Phone Number:	865-935-4570
E-Mail Address:	hsmith@gmstnn.com

Florida	1. Gross Sales	2. Exempt Sales	3. Taxable Amount	4. Tax Due
A. Sales/Services/Electricity	\$ 1006.00	\$ 0.00	\$ 1006.00	\$ 70.42
B. Taxable Purchases			\$ 0.00	\$ 0.00
C. Commercial Rentals	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
C(a). Less Sales Tax Scholarship Credits				\$ 0.00
D. Transient Rentals	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
E. Food & Beverage Vending	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
5. Total Amount of Tax Due				\$ 70.42
6. Less Lawful Deductions				\$ 0.00
7. Net Tax Due				\$ 70.42
8. Less Est Tax Pd/DOR Cr Memo				\$ 0.00
9. Plus Est. Tax Due Current Month				\$ 0.00
10. Amount Due				\$ 70.42
You have chosen not to donate your collection allowance to education.				
11. Less Collection Allowance				\$ 0.00
12. Plus Penalty				\$ 0.00
13. Plus Interest				\$ 0.00
14. Amount Due with Return				\$ 70.42
Payment you have authorized				70.42
15(a). Exempt Amount of Items Over \$5000 (included in Column 3)			15(a). \$	0.00
15(b). Other Taxable Amounts NOT Subject to Surtax (included in Column 3)			15(b). \$	0.00
15(c). Amounts Subject to Surtax at a Rate Different than Your County Surtax Rate (included in Column 3)			15(c). \$	0.00
15(d). Total Amount of Discretionary Sales Surtax Due (included in Column 4)			15(d). \$	10.06
16. Hope Scholarship Credits (included in Line 6)			16. \$	0.00
17. Taxable Sales/Untaxed Purchases or Uses of Electricity (included in Line A)			17. \$	0.00
18. Taxable Sales/Untaxed Purchases of Dyed Diesel Fuel (included in Line A)			18. \$	0.00
19. Taxable Sales from Amusement Machines (included in Line A)			19. \$	0.00
20. Rural or Urban High Crime Area Job Tax Credits			20. \$	0.00
21(a). Scholarship Funding Tax Credit			21(a). \$	0.00
21(b). Film and Entertainment Industry Credit			21(b). \$	0.00
21(c). Economic Energy Zone Credit			21(c). \$	0.00
21 Other Authorized Credits			21. \$	0.00



State of Florida Department of Revenue

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Original Return

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Cancellations must be done before 5:00 p.m. ET on the submission date. If the submission is completed after 5:00 p.m. ET on the submission date, weekend, or holiday the cancellation must be done before 5:00 p.m. ET the next business day. All cancellations are permanently deleted from our database.

Access Source: 68-8015405857-5**Confirmation Number: 210915947674**

DR-15

Certificate Number

Collection Period

Confirm Date and Time

68-8015405857-5

08/2021

09/15/2021 11:59:30 AM ET

Location Address

2200 PLANTATION BLVD
NORTH PORT, FL 34289-9472

LAKESIDE PLANTATION COMMUNITY
DEVELOPMEN
219 E LIVINGSTON ST
ORLANDO, FL 32801-1508

Contact Information

Name

Hannah Smith

Phone

(865) 617 - 8194

Email

hsmith@gmstnn.com

Debit Date:	9/16/2021
Amount for Check:	\$84.48
Bank Routing Number:	263191387
Bank Account Number:	1100002235372
Bank Account Type:	Checking
Corporate/Personal:	Corporate
Name on Bank Account:	Lakeside Plantation CD

Due to federal security requirements, we can not process international ACH transactions. If any portion of the money used in the payment you may be making today came from a financial institution located outside of the US or its territories for the purpose of funding this payment, please do not proceed and contact the Florida Department of Revenue at 850-488-6800 to make other payment arrangements. By continuing, you are confirming that this payment is not an international ACH transaction. If you are unsure, please contact your financial institution.

I hereby authorize the Department of Revenue to process this ACH transaction and to debit the checking account identified above. I understand there may be service charges assessed on any transactions not honored by my bank.

Signature:	Hannah Smith
Phone Number:	865-617-8194
E-Mail Address:	hsmith@gmstnn.com

	Florida	1. Gross Sales	2. Exempt Sales	3. Taxable Amount	4. Tax Due
A. Sales/Services/Electricity	\$	1056.00	\$ 0.00	\$ 1056.00	\$ 84.48
B. Taxable Purchases				\$ 0.00	\$ 0.00
C. Commercial Rentals	\$	0.00	\$ 0.00	\$ 0.00	\$ 0.00
C(a). Less Sales Tax Scholarship Credits					\$ 0.00
D. Transient Rentals	\$	0.00	\$ 0.00	\$ 0.00	\$ 0.00
E. Food & Beverage Vending	\$	0.00	\$ 0.00	\$ 0.00	\$ 0.00
5. Total Amount of Tax Due					\$ 84.48
6. Less Lawful Deductions					\$ 0.00
7. Net Tax Due					\$ 84.48
8. Less Est Tax Pd/DOR Cr Memo					\$ 0.00
9. Plus Est. Tax Due Current Month					\$ 0.00
10. Amount Due					\$ 84.48
You have chosen not to donate your collection allowance to education.					
11. Less Collection Allowance					\$ 0.00
12. Plus Penalty					\$ 0.00
13. Plus Interest					\$ 0.00
14. Amount Due with Return					\$ 84.48
Payment you have authorized					84.48
15(a). Exempt Amount of Items Over \$5000 (included in Column 3)				15(a). \$	0.00
15(b). Other Taxable Amounts NOT Subject to Surtax (included in Column 3)				15(b). \$	0.00
15(c). Amounts Subject to Surtax at a Rate Different than Your County Surtax Rate (included in Column 3)				15(c). \$	0.00
15(d). Total Amount of Discretionary Sales Surtax Due (included in Column 4)				15(d). \$	10.56
16. Hope Scholarship Credits (included in Line 6)				16. \$	0.00
17. Taxable Sales/Untaxed Purchases or Uses of Electricity (included in Line A)				17. \$	0.00
18. Taxable Sales/Untaxed Purchases of Dyed Diesel Fuel (included in Line A)				18. \$	0.00
19. Taxable Sales from Amusement Machines (included in Line A)				19. \$	0.00
20. Rural or Urban High Crime Area Job Tax Credits				20. \$	0.00
21(a). Scholarship Funding Tax Credit				21(a). \$	0.00
21(b). Film and Entertainment Industry Credit				21(b). \$	0.00
21(c). Economic Energy Zone Credit				21(c). \$	0.00
21 Other Authorized Credits				21. \$	0.00

SECTION C

Lakeside Plantation
Community Development District

Unaudited Financial Reporting
September 30, 2021

GMS

Lakeside Plantation
Community Development District
Combined Balance Sheet
September 30, 2021

	General Fund	Debt Service Fund	Capital Projects Fund	Totals Governmental Funds
Assets:				
Cash:				
Operating Account	\$ 58,045	\$ -	\$ -	\$ 58,045
Debit Card Account	\$ 2,561	\$ -	\$ -	\$ 2,561
Money Market Account	\$ 103,284	\$ -	\$ -	\$ 103,284
Petty Cash	\$ 3	\$ -	\$ -	\$ 3
Capital Reserve Account	\$ -	\$ -	\$ 33,353	\$ 33,353
Investment - Operations:				
State Board of Administration	\$ 508	\$ -	\$ 359,362	\$ 359,870
Investment - Bonds:				
Reserve Fund	\$ -	\$ 76,560	\$ -	\$ 76,560
Revenue Fund	\$ -	\$ 34,483	\$ -	\$ 34,483
Prepayment Fund	\$ -	\$ 0	\$ -	\$ 0
Assessment Receivable	\$ -	\$ -	\$ -	\$ -
Prepaid Expenses	\$ 17,144	\$ -	\$ -	\$ 17,144
Due from Capital Reserve	\$ -	\$ -	\$ -	\$ -
Deposits	\$ 517	\$ -	\$ -	\$ 517
Due from General Fund	\$ -	\$ 8,981	\$ -	\$ 8,981
Due from Other	\$ 33	\$ -	\$ -	\$ 33
Prepaid Items	\$ 3,181	\$ -	\$ -	\$ 3,181
Total Assets	\$ 185,275	\$ 120,024	\$ 392,715	\$ 698,013
Liabilities:				
Accounts Payable	\$ 3,281	\$ -	\$ -	\$ 3,281
Accrued Expenses	\$ 1,018	\$ -	\$ -	\$ 1,018
Due to General Fund	\$ -	\$ -	\$ -	\$ -
Due to Debt Service	\$ 8,981	\$ -	\$ -	\$ 8,981
Total Liabilities	\$ 13,280	\$ -	\$ -	\$ 13,280
Fund Balance:				
Nonspendable:				
Deposits	\$ 517	\$ -	\$ -	\$ 517
Restricted for:	\$ -	\$ -	\$ -	\$ -
Prepaid Items	\$ 3,181	\$ -	\$ -	\$ 3,181
Assigned Debt Service	\$ -	\$ 120,024	\$ -	\$ 120,024
Assigned Capital Projects	\$ -	\$ -	\$ 392,715	\$ 392,715
Assigned	\$ 31,955	\$ -	\$ -	\$ 31,955
Unassigned	\$ 119,197	\$ -	\$ -	\$ 119,197
Total Fund Balances	\$ 171,994	\$ 120,024	\$ 392,715	\$ 684,733
Total Liabilities & Fund Balance	\$ 185,275	\$ 120,024	\$ 392,715	\$ 698,013

Table of Contents

1	Balance Sheet
2-3	General Fund
4	Debt Service Fund
5	Capital Reserve Fund
6-7	Month to Month
8	Long-Term Debt
9	Assessment Receipt Schedule

Lakeside Plantation
Community Development District
General Fund
Statement of Revenues, Expenditures, and Changes in Fund Balance
For The Period Ending September 30, 2021

	Adopted Budget	Prorated Budget Thru 09/30/21	Actual Thru 09/30/21	Variance
Revenues:				
Tennis Club	\$ 20,000	\$ 20,000	\$ 13,885	\$ (6,115)
Activities	\$ 10,000	\$ 10,000	\$ 715	\$ (9,285)
Clubhouse Rentals	\$ 5,000	\$ 5,000	\$ 200	\$ (4,800)
Miscellaneous	\$ 1,500	\$ 1,500	\$ 106	\$ (1,394)
Interest Earnings	\$ 50	\$ 50	\$ 27	\$ (23)
Operation & Maintenance Assessments	\$ 686,794	\$ 686,794	\$ 665,740	\$ (21,055)
Total Revenues	\$ 723,344	\$ 723,344	\$ 680,673	\$ (42,671)
Expenditures:				
General & Administrative:				
Supervisor Fees	\$ 11,000	\$ 11,000	\$ 9,800	\$ 1,200
District Manager	\$ 38,246	\$ 38,246	\$ 38,247	\$ (1)
District Counsel	\$ 25,750	\$ 25,750	\$ 21,074	\$ 4,676
District Engineer	\$ 14,000	\$ 14,000	\$ 12,257	\$ 1,743
Disclosure Report	\$ 1,000	\$ 1,000	\$ 1,100	\$ (100)
Trustee Fees	\$ 4,771	\$ 4,771	\$ 4,770	\$ 0
Audit Fees	\$ 3,185	\$ 3,185	\$ 3,185	\$ -
Postage, Phone, Faxes, Copies	\$ 1,500	\$ 1,500	\$ 1,278	\$ 222
General Liability Insurance	\$ 6,371	\$ 6,371	\$ 6,081	\$ 290
Legal Advertising	\$ 1,700	\$ 1,700	\$ 3,394	\$ (1,694)
Dues, Licenses & Fees	\$ 175	\$ 175	\$ 175	\$ -
Other Current Charges	\$ 1,900	\$ 1,900	\$ 2,833	\$ (933)
Property Insurance	\$ 9,865	\$ 9,865	\$ 9,863	\$ 2
Information Technology	\$ 1,300	\$ 1,300	\$ 1,000	\$ 300
Total General & Administrative:	\$ 120,763	\$ 120,763	\$ 115,056	\$ 5,707
Operations:				
Personnel Services (Management Contract)	\$ 179,945	\$ 179,945	\$ 174,076	\$ 5,869
Road & Sidewalk Repairs & Maintenance	\$ 2,500	\$ 2,500	\$ 2,027	\$ 473
Common Area Renewal & Maintenance	\$ 5,000	\$ 5,000	\$ -	\$ 5,000
Street Light/Decorative Light	\$ 5,000	\$ 5,000	\$ 745	\$ 4,255
Landscape Maintenance - Contract	\$ 91,860	\$ 91,860	\$ 91,860	\$ -
Landscape Maintenance - Other	\$ 5,000	\$ 5,000	\$ 3,765	\$ 1,235
Mulch	\$ 10,740	\$ 10,740	\$ 9,400	\$ 1,340
Irrigation Maintenance	\$ 4,500	\$ 4,500	\$ 308	\$ 4,193
Lake Maintenance	\$ 14,000	\$ 14,000	\$ 13,524	\$ 476
Electric Utility Services - Entrance Feature	\$ 9,000	\$ 9,000	\$ 5,343	\$ 3,657
Water Utility Services - Entrance Feature	\$ 4,000	\$ 4,000	\$ 3,098	\$ 902
Repairs & Maintenance - Entrance Feature	\$ 3,000	\$ 3,000	\$ 3,911	\$ (911)
Miscellaneous Tools & Equipment	\$ 1,000	\$ 1,000	\$ -	\$ 1,000
Traffic Enforcement	\$ 2,500	\$ 2,500	\$ -	\$ 2,500
Total Operations:	\$ 338,045	\$ 338,045	\$ 308,055	\$ 29,990

Lakeside Plantation
Community Development District
General Fund
Statement of Revenues, Expenditures, and Changes in Fund Balance
For The Period Ending September 30, 2021

	Adopted Budget	Prorated Budget Thru 09/30/21	Actual Thru 09/30/21	Variance
<u>Clubhouse:</u>				
Activities	\$ 20,000	\$ 20,000	\$ 6,864	\$ 13,136
License/Fees	\$ 1,200	\$ 1,200	\$ 1,848	\$ (648)
General Supplies	\$ 10,000	\$ 10,000	\$ 2,780	\$ 7,220
Maintenance	\$ 14,000	\$ 14,000	\$ 28,666	\$ (14,666)
Office Supplies	\$ 3,500	\$ 3,500	\$ 906	\$ 2,594
Public Communication	\$ 1,500	\$ 1,500	\$ 497	\$ 1,003
Pest Control	\$ 600	\$ 600	\$ 150	\$ 450
Security	\$ 1,500	\$ 1,500	\$ 1,305	\$ 195
Security Patrol	\$ 30,274	\$ 30,274	\$ 22,398	\$ 7,876
AED	\$ 500	\$ 500	\$ -	\$ 500
Telephone & Internet Services	\$ 5,500	\$ 5,500	\$ 5,811	\$ (311)
Janitorial Supplies	\$ 3,250	\$ 3,250	\$ 1,097	\$ 2,153
Electric Utility Services - Clubhouse	\$ 14,000	\$ 14,000	\$ 12,491	\$ 1,509
Gas Utility	\$ 250	\$ 250	\$ 346	\$ (96)
Garbage Collection	\$ 2,100	\$ 2,100	\$ 1,852	\$ 248
Water Utility Services - Clubhouse	\$ 4,400	\$ 4,400	\$ 2,542	\$ 1,858
Electric Utility Services - Tennis Courts/Pool	\$ 16,000	\$ 16,000	\$ 10,348	\$ 5,652
Pool Cleaning	\$ 9,720	\$ 9,720	\$ 7,900	\$ 1,820
Pool Maintenance - Other	\$ 10,000	\$ 10,000	\$ 10,197	\$ (197)
Tennis Courts - Maintenance	\$ 5,000	\$ 5,000	\$ 9,286	\$ (4,286)
Tennis Courts - Programs	\$ 3,500	\$ 3,500	\$ -	\$ 3,500
Water Utility Services - Pool	\$ 6,000	\$ 6,000	\$ 4,957	\$ 1,043
Total Clubhouse:	\$ 162,794	\$ 162,794	\$ 132,240	\$ 30,554
Total Expenditures	\$ 621,601	\$ 621,601	\$ 555,351	\$ 66,250
<u>Other Financing Sources/(Uses)</u>				
Transfer Out - Capital Reserve Fund (CY)	\$ 130,000	\$ 130,000	\$ 130,000	\$ -
Total Other Financing Sources (Uses)	\$ 130,000	\$ 130,000	\$ 130,000	\$ -
Excess Revenues (Expenditures)	\$ (28,257)		\$ (4,678)	
Fund Balance - Beginning	\$ 28,257		\$ 176,672	
Fund Balance - Ending	\$ 0		\$ 171,994	

Lakeside Plantation
Community Development District
Debt Service Series 1999

Statement of Revenues, Expenditures, and Changes in Fund Balance

For The Period Ending September 30, 2021

	Adopted Budget	Prorated Budget Thru 09/30/21	Actual Thru 09/30/21	Variance
Revenues:				
Assessments - On Roll	\$ 175,905	\$ 175,905	\$ 170,164	\$ (5,741)
Assessments - Direct	\$ 8,842	\$ 8,842	\$ 8,842	\$ 0
Assessments - Prepayments	\$ -	\$ -	\$ 2,757	\$ 2,757
Interest Income	\$ -	\$ -	\$ 8	\$ 8
Total Revenues	\$ 184,748	\$ 184,748	\$ 181,772	\$ (2,976)
Expenditures:				
General & Administrative:				
Interest- 11/1	48,303	\$ 48,303	\$ 48,303	\$ -
Principal- 5/1	\$ 85,000	\$ 85,000	\$ 85,000	\$ -
Interest- 5/1	\$ 48,303	\$ 48,303	\$ 48,303	\$ -
Special Call 5/1	\$ -	\$ -	\$ 5,000	\$ (5,000)
Total Expenditures	\$ 181,605	\$ 181,605	\$ 186,605	\$ (5,000)
Excess Revenues (Expenditures)	\$ 3,143		\$ (4,833)	
Fund Balance - Beginning	\$ 65,611		\$ 124,857	
Fund Balance - Ending	\$ 68,754		\$ 120,024	

Lakeside Plantation
Community Development District
Capital Reserve Fund
Statement of Revenues, Expenditures, and Changes in Fund Balance
For The Period Ending September 30, 2021

	Adopted Budget	Prorated Budget Thru 09/30/21	Actual Thru 09/30/21	Variance
Revenues:				
Interest Earnings	\$ -	\$ -	\$ 559	\$ 559
Total Revenues	\$ -	\$ -	\$ 559	\$ 559
Expenditures:				
General & Administrative:				
Clubhouse Exterior Building Elements	\$ 52,983	\$ 52,983	\$ -	\$ 52,983
Property Site Elements	\$ 29,453	\$ 29,453	\$ 43,136	\$ (13,683)
Clubhouse Renewal/Replacements	\$ -	\$ -	\$ 71,014	\$ (71,014)
Total Expenditures	\$ 82,436	\$ 82,436	\$ 114,150	\$ (31,714)
Other Sources/(Uses)				
Transfer In - Capital Reserve Fund	\$ 130,000	\$ 130,000	\$ 130,000	\$ -
Total Other Financing Sources (Uses)	\$ 130,000	\$ 130,000	\$ 130,000	\$ -
Excess Revenues (Expenditures)	\$ 47,564		\$ 16,409	
Fund Balance - Beginning	\$ 438,337		\$ 376,306	
Fund Balance - Ending	\$ 485,901		\$ 392,715	

Lakeside Plantation

Community Development District

Month to Month

	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Total
Revenues:													
Tennis Club	\$ 1,381	\$ -	\$ 1,315	\$ 3,133	\$ 2,338	\$ -	\$ 1,258	\$ 1,198	\$ 470	\$ 1,006	\$ 1,056	\$ 730	\$ 13,885
Activities	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 350	\$ 365	\$ -	\$ -	\$ -	\$ -	\$ 715
Clubhouse Rentals	\$ -	\$ -	\$ -	\$ 200	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 200
Miscellaneous	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 106	\$ -	\$ -	\$ -	\$ 106
Interest Earnings	\$ 1	\$ 1	\$ 4	\$ 5	\$ 3	\$ 2	\$ 2	\$ 3	\$ 2	\$ 2	\$ 2	\$ 1	\$ 27
Operation & Maintenance Assessments	\$ -	\$ 363,928	\$ 199,671	\$ 21,187	\$ 11,852	\$ 10,269	\$ 15,993	\$ 9,131	\$ 30,354	\$ 4	\$ 3,350	\$ -	\$ 665,740
Total Revenues	\$ 1,382	\$ 363,929	\$ 200,990	\$ 24,525	\$ 14,192	\$ 10,271	\$ 17,604	\$ 10,697	\$ 30,931	\$ 1,012	\$ 4,408	\$ 731	\$ 680,673
Expenditures:													
General & Administrative:													
Supervisor Fees	\$ 1,000	\$ -	\$ 2,000	\$ 200	\$ 1,000	\$ 800	\$ 1,000	\$ 1,000	\$ 1,000	\$ -	\$ 800	\$ 1,000	\$ 9,800
District Manager	\$ 3,187	\$ 3,187	\$ 3,187	\$ 3,187	\$ 3,188	\$ 3,187	\$ 3,187	\$ 3,187	\$ 3,187	\$ 3,187	\$ 3,187	\$ 3,187	\$ 38,247
District Counsel	\$ 1,316	\$ 879	\$ 1,577	\$ 2,096	\$ 2,963	\$ 1,152	\$ 2,238	\$ 2,645	\$ 3,490	\$ 569	\$ 2,150	\$ -	\$ 21,074
District Engineer	\$ -	\$ 813	\$ -	\$ 2,298	\$ 393	\$ 751	\$ 125	\$ 656	\$ 1,628	\$ 1,624	\$ 1,654	\$ 2,317	\$ 12,257
Disclosure Report	\$ 83	\$ 83	\$ 83	\$ 83	\$ 83	\$ 83	\$ 103	\$ 83	\$ 83	\$ 83	\$ 83	\$ 83	\$ 1,100
Trustee Fees	\$ 3,180	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,590	\$ -	\$ -	\$ -	\$ 4,770
Audit Fees	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,185	\$ -	\$ -	\$ -	\$ 3,185
Postage, Phone, Faxes, Copies	\$ 67	\$ 181	\$ 77	\$ 211	\$ 119	\$ 57	\$ 11	\$ 40	\$ 54	\$ 19	\$ 109	\$ 333	\$ 1,278
General Liability Insurance	\$ 6,081	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 6,081
Legal Advertising	\$ 199	\$ 183	\$ 184	\$ 187	\$ 187	\$ -	\$ -	\$ -	\$ -	\$ 2,416	\$ -	\$ 37	\$ 3,394
Dues, Licenses & Fees	\$ 175	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 175
Other Current Charges	\$ 1	\$ 101	\$ 0	\$ 1,093	\$ 233	\$ 25	\$ 164	\$ 0	\$ 2	\$ 1,025	\$ 70	\$ 118	\$ 2,833
Property Insurance	\$ 9,863	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 9,863
Information Technology	\$ 83	\$ 83	\$ 83	\$ 83	\$ 83	\$ 83	\$ 83	\$ 83	\$ 83	\$ 83	\$ 83	\$ 83	\$ 1,000
Total General & Administrative	\$ 25,236	\$ 5,511	\$ 7,193	\$ 9,438	\$ 8,250	\$ 6,140	\$ 6,991	\$ 7,696	\$ 14,391	\$ 9,007	\$ 8,137	\$ 7,158	\$ 115,056
Operations:													
Personnel Services (Management Contract)	\$ 14,995	\$ 14,995	\$ 12,394	\$ 14,995	\$ 14,995	\$ 14,995	\$ 14,995	\$ 14,995	\$ 15,420	\$ 14,995	\$ 14,995	\$ 11,302	\$ 174,076
Road & Sidewalk Repairs & Maintenance	\$ -	\$ -	\$ -	\$ 29	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,998	\$ 2,027
Common Area Renewal & Maintenance	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Street Light/Decorative Light	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 745	\$ -	\$ -	\$ -	\$ 745
Landscape Maintenance - Contract	\$ 7,655	\$ 7,655	\$ 7,655	\$ 7,655	\$ 7,655	\$ 7,655	\$ 7,655	\$ 7,655	\$ 7,655	\$ 7,655	\$ 7,655	\$ 7,655	\$ 91,860
Landscape Maintenance - Other	\$ -	\$ -	\$ 785	\$ -	\$ 1,342	\$ 1,375	\$ 173	\$ 90	\$ -	\$ -	\$ -	\$ -	\$ 3,765
Mulch	\$ -	\$ 9,200	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 200	\$ -	\$ 9,400
Irrigation Maintenance	\$ 233	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 75	\$ -	\$ 308
Lake Maintenance	\$ 966	\$ 1,932	\$ 966	\$ 966	\$ 966	\$ 966	\$ 1,932	\$ 966	\$ 966	\$ 966	\$ 966	\$ 966	\$ 13,524
Electric Utility Services - Entrance Feature	\$ 574	\$ 561	\$ 599	\$ 571	\$ 603	\$ 351	\$ -	\$ 357	\$ 281	\$ 484	\$ 615	\$ 349	\$ 5,343
Water Utility Services - Entrance Feature	\$ 24	\$ 25	\$ 29	\$ 33	\$ 44	\$ 73	\$ 20	\$ 29	\$ 29	\$ 2,792	\$ -	\$ -	\$ 3,098
Repairs & Maintenance - Entrance Feature	\$ -	\$ -	\$ -	\$ 154	\$ -	\$ 416	\$ 450	\$ 1,695	\$ 1,048	\$ 148	\$ -	\$ -	\$ 3,911
Miscellaneous Tools & Equipment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Landscape Inspection Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Traffic Enforcement	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Tree Removal	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Operations:	\$ 24,446	\$ 34,368	\$ 22,428	\$ 24,403	\$ 25,605	\$ 25,831	\$ 25,225	\$ 25,787	\$ 26,144	\$ 27,041	\$ 24,506	\$ 22,270	\$ 308,855

Lakeside Plantation

Community Development District
Month to Month

	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Total
Clubhouse:													
Activities	\$ 180	\$ 395	\$ -	\$ 420	\$ 317	\$ 256	\$ 400	\$ 973	\$ 44	\$ -	\$ -	\$ 3,879	\$ 6,864
License/Fees	\$ -	\$ -	\$ -	\$ -	\$ 847	\$ -	\$ -	\$ -	\$ 1,001	\$ -	\$ -	\$ -	\$ 1,848
General Supplies	\$ 554	\$ 157	\$ 1,074	\$ 471	\$ 462	\$ 61	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,780
Maintenance	\$ 2,396	\$ 713	\$ 138	\$ 1,280	\$ 1,890	\$ 1,246	\$ 5,760	\$ 4,900	\$ 1,700	\$ 2,819	\$ 3,299	\$ 2,525	\$ 28,666
Office Supplies	\$ 150	\$ 13	\$ -	\$ 439	\$ 233	\$ 35	\$ 35	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 906
Public Communication	\$ 77	\$ 108	\$ 77	\$ -	\$ 77	\$ 77	\$ -	\$ 82	\$ -	\$ -	\$ -	\$ -	\$ 497
Pest Control	\$ -	\$ 150	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 150
Security	\$ -	\$ 147	\$ 344	\$ 115	\$ 147	\$ -	\$ -	\$ 147	\$ -	\$ -	\$ 405	\$ -	\$ 1,305
Security Patrol	\$ 1,680	\$ 1,680	\$ -	\$ -	\$ -	\$ -	\$ 278	\$ 9,520	\$ -	\$ -	\$ -	\$ 9,240	\$ 22,398
AED	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Telephone & Internet Services	\$ 472	\$ 548	\$ 435	\$ 438	\$ 560	\$ 448	\$ 449	\$ 565	\$ 1,139	\$ 116	\$ -	\$ 642	\$ 5,811
Janitorial Supplies	\$ 90	\$ 57	\$ 260	\$ 195	\$ 115	\$ 380	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,097
Electric Utility Services - Clubhouse	\$ 858	\$ 783	\$ 865	\$ 815	\$ 925	\$ 2,124	\$ 867	\$ 933	\$ 926	\$ 1,098	\$ 1,138	\$ 1,158	\$ 12,491
Gas Utility	\$ 12	\$ 12	\$ 12	\$ 12	\$ 16	\$ 16	\$ 16	\$ 16	\$ 16	\$ 185	\$ 16	\$ 16	\$ 346
Garbage Collection	\$ 168	\$ 330	\$ -	\$ 168	\$ 168	\$ 168	\$ 168	\$ 168	\$ 168	\$ -	\$ 175	\$ 168	\$ 1,852
Water Utility Services - Clubhouse	\$ 140	\$ 663	\$ 144	\$ 144	\$ 244	\$ 155	\$ 166	\$ 166	\$ 177	\$ 231	\$ 144	\$ 166	\$ 2,542
Electric Utility Services - Tennis Courts/Pool	\$ 598	\$ 663	\$ 865	\$ 861	\$ 1,198	\$ 1,061	\$ 1,245	\$ 893	\$ 944	\$ 730	\$ 675	\$ 614	\$ 10,348
Pool Cleaning	\$ 850	\$ 850	\$ 850	\$ 850	\$ 850	\$ 1,100	\$ 850	\$ -	\$ -	\$ -	\$ 850	\$ 850	\$ 7,900
Pool Maintenance - Other	\$ 1,967	\$ -	\$ 227	\$ 2,490	\$ 850	\$ 321	\$ 250	\$ 129	\$ 1,532	\$ 1,915	\$ -	\$ 515	\$ 10,197
Tennis Courts - Maintenance	\$ 301	\$ 58	\$ 1,293	\$ 738	\$ 561	\$ 2,915	\$ 1,695	\$ 1,725	\$ -	\$ -	\$ -	\$ -	\$ 9,286
Tennis Courts - Programs	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Water Utility Services - Pool	\$ 484	\$ 327	\$ 372	\$ 436	\$ 309	\$ 564	\$ 491	\$ 473	\$ 552	\$ 250	\$ 318	\$ 382	\$ 4,957
Total Clubhouse:	\$ 10,979	\$ 7,653	\$ 6,956	\$ 9,873	\$ 9,768	\$ 10,929	\$ 12,671	\$ 20,690	\$ 8,201	\$ 7,344	\$ 7,020	\$ 20,156	\$ 132,240
Total Expenditures	\$ 60,661	\$ 47,532	\$ 36,576	\$ 43,714	\$ 43,623	\$ 42,899	\$ 44,887	\$ 54,173	\$ 48,646	\$ 43,392	\$ 39,663	\$ 49,584	\$ 555,351
Transfer Out - Capital Reserve Fund (CY)	\$ -	\$ -	\$ -	\$ -	\$ 130,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 130,000
Total Other Financing Sources (Uses)	\$ -	\$ -	\$ -	\$ -	\$ 130,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 130,000
Excess Revenues (Expenditures)	\$ (59,279)	\$ 316,397	\$ 164,414	\$ (19,189)	\$ (159,431)	\$ (32,629)	\$ (27,283)	\$ (43,476)	\$ (17,715)	\$ (42,480)	\$ (35,255)	\$ (48,853)	\$ (4,678)

Lakeside Plantation

Community Development District

Long Term Debt Report

SERIES 1999A, CAPITAL IMPROVEMENT REVENUE BONDS		
INTEREST RATE:	6.950%	
MATURITY DATE:	5/1/2031	
RESERVE FUND REQUIREMENT	MAXIMUM ANNUAL DEBT SERVICE	
RESERVE FUND REQUIREMENT	\$	189,896
RESERVE FUND BALANCE	\$	76,560
BONDS OUTSTANDING - 9/30/13	\$	1,860,000.00
LESS: PRINCIPAL PAYMENT 5/1/14	\$	(55,000.00)
LESS: PRINCIPAL PAYMENT 11/1/14 (PREPAYMENT)	\$	(5,000.00)
LESS: PRINCIPAL PAYMENT 5/1/15	\$	(60,000.00)
LESS: PRINCIPAL PAYMENT 5/1/16	\$	(60,000.00)
LESS: PRINCIPAL PAYMENT 5/1/17	\$	(65,000.00)
LESS: PRINCIPAL PAYMENT 5/1/18	\$	(70,000.00)
LESS: PRINCIPAL PAYMENT 5/1/19	\$	(75,000.00)
LESS: PRINCIPAL PAYMENT 5/1/20	\$	(80,000.00)
LESS: PRINCIPAL PAYMENT 5/1/21	\$	(85,000.00)
LESS: PRINCIPAL PAYMENT 5/1/21 (PREPAYMENT)	\$	(5,000.00)
CURRENT BONDS OUTSTANDING	\$	1,300,000.00

LAKESIDE PLANTATION
COMMUNITY DEVELOPMENT DISTRICT
Special Assessment Receipts
Fiscal Year 2021

Gross Assessment \$ 726,648.19 \$ 185,732.67 \$912,380.86
Net Assessment \$ 683,049.30 \$ 174,588.71 \$ 857,638.01

TOTAL ASSESSMENT LEVY									
ASSESSED THROUGH COUNTY									
79.64% 20.36% 100.00%									
DATE	DESCRIPTION	GROSS AMT	COMMISSIONS	DISC/PENALTY	INTEREST	NET RECEIPTS	O&M Portion	1999 DSF Portion	Total
11/25/20	P/E 11/09/20	\$93,667.83	\$1,405.02	\$0.00	\$0.00	\$92,262.81	\$73,480.94	\$18,781.87	\$92,262.81
11/30/20	P/E 11/18/20	\$370,239.10	\$5,553.59	\$0.00	\$0.00	\$364,685.51	\$290,446.76	\$74,238.75	\$364,685.51
12/22/20	P/E 11/30/20	\$185,038.04	\$2,775.57	\$0.00	\$0.00	\$182,262.47	\$145,159.44	\$37,103.03	\$182,262.47
12/30/20	P/E 12/04/20	\$69,487.36	\$1,042.31	\$0.00	\$0.00	\$68,445.05	\$54,511.74	\$13,933.31	\$68,445.05
01/29/21	P/E 12/30/20	\$26,985.98	\$404.79	\$0.00	\$21.49	\$26,602.68	\$21,187.19	\$5,415.49	\$26,602.68
02/26/21	P/E 1/31/21	\$15,107.70	\$226.62	\$0.00	\$0.00	\$14,881.08	\$11,851.75	\$3,029.33	\$14,881.08
03/31/21	P/E 2/28/21	\$13,089.86	\$196.35	\$0.00	\$0.00	\$12,893.51	\$10,268.79	\$2,624.72	\$12,893.51
04/30/21	P/E 3/31/21	\$20,386.79	\$305.80	\$0.00	\$0.00	\$20,080.99	\$15,993.12	\$4,087.87	\$20,080.99
05/28/21	P/E 4/30/21	\$11,465.48	\$0.00	\$0.00	\$0.00	\$11,465.48	\$9,131.46	\$2,334.02	\$11,465.48
07/01/21	P/E 6/3/21	\$38,692.62	\$580.39	\$0.00	\$0.00	\$38,112.23	\$30,353.75	\$7,758.48	\$38,112.23
07/30/21	Interest	\$0.00	\$0.00	\$0.00	\$5.41	\$5.41	\$4.31	\$1.10	\$5.41
09/02/21	P/E 7/31/21	\$4,206.58	\$0.00	\$0.00	\$0.00	\$4,206.58	\$3,350.25	\$856.33	\$4,206.58
TOTAL		\$848,367.34	\$12,490.44	\$0.00	\$26.90	\$835,903.80	\$665,739.51	\$170,164.29	\$835,903.80

97% Net Percent Collected

IMAGINE SCHOOL AT NORTH POINT INC					
Net Assessments					
DATE RECEIVED	DUE DATE	CHECK NO.	NET ASSESSED	AMOUNT RECEIVED	DEBT SERVICE FUND 1999A
10/20/20	11/1/20	4421.02	\$4,421.02	\$4,421.02	\$4,421.02
10/20/20	2/1/21	2210.51	\$2,210.51	\$2,210.51	\$2,210.51
10/20/20	5/1/21	2210.51	\$2,210.51	\$2,210.51	\$2,210.51
Total			\$8,842.04	\$8,842.04	\$8,842.04

SECTION IX

SECTION B

SECTION 1

Lakeside Plantation CDD

ACTION ITEMS

October 2021

Item #	Meeting Assigned	Action Item	Assigned To	Date Due	Status	Comments
1	12/16/20	Erosion Behind Tennis Courts	DE		In Process	DE to provide direction to amenity management staff on minor corrections and maintenance.
2	12/16/20	Water Ponding Near Swale N of Magnolia	DE		In Process	BOS approved proposal 08.18.2021. Work completed and scheduled for DE inspection 09.15.2021. DE advised additional sod was required to complete the project 09.15.2021.
3	3/17/21	Tennis Fees and Policies	DC/DM		Completed	New fees and policies adopted 09.15.2021.
4	5/19/21	Determine Feasibility of Fountains and/or Aerators on certain ponds	DE		In Process	BOS to consider proposals 09.15.2021 including electrical installation and maintenance costs. Item deferred for pond water quality assessment.
5	6/16/21	Provide proposal for Access Control System and Security Cameras	AM		In Process	AM has met with several vendors. A closed session will be on the agenda 09.15.2021. Item deferred/on hold.
6	8/18/21	Traffic Calming - Speed Humps, Speed Bumps, Speed Tables on Scarlett	DE/DM		In Process	DE has provided preliminary information which will be presented to the BOS 11.17.2021.
7		Pool Equipment Area Drainage	DE		In Process	DE has met with contractor to review area.

SECTION C

Lakeside Plantation CDD

Amenity Center Management Report 10/20/2021 CDD Meeting

1. Amenity Clubhouse Update:

- a. The Tennis awnings have been put up.
- b. Air360 came out to replace one fan blade in the clubhouse AC unit.
- c. Exit Fountain was down temporarily but was repaired by staff.
- d. Three new table umbrellas and two stand umbrellas have been put out on the pool deck.
- e. John Fish was medically cleared and returned to work 10/11/21. He is working to accomplish some of the outstanding maintenance tasks with an initial focus on the tennis courts.

2. Project Updates:

- a. Sidewalks – Bradley Concrete started repairs and replacements project. A total of 36 grinds have been completed and replacements sidewalk sections are now scheduled for some time October. Still awaiting actual schedule for remainder of the project and will update the board at the meeting.
- b. Ceiling corridor project has started on 9/7/2021 and was completed 9/29/2021, fans have arrived and scheduled for install on or before 10/20.
- c. Cameras and access cards quotes are submitted. (Project Currently on Hold)
- d. Palm trees around clubhouse and Blvd. cut back on 9/30/21.
- e. Pool heaters installed 9/27/21 and completed 9/28/21.
- f. New bike rack installed.

3. Special Events:

- a. Wine and Cheese was held Tuesday September 21st.
- b. Cider & Donuts Thursday October 7th.
- c. Halloween Trick or treating the City of North Port Police hired and confirmed as of 9/30/21.
- d. Craft Day held twice a month October 5th & 19th.
- e. Pizza & Movie scheduled for Tuesday October 26th.
- f. Halloween Party scheduled for Friday the 29th of October.