

Agenda
Bayshore Gardens Park & Recreation District
Board of Trustees Meeting
Wednesday; July 26, 2023 @ 7:00 P.M.

1. Roll Call
2. Call to Order
3. Pledge to Flag
4. Approval of Minutes: 5/10/23 BOT Work Session / 6/28/23 BOT Meeting & 7/12/23 BOT Work Session
5. Treasurer's Report
6. Trustee Committee Reports
 - Marina (Morris)
 - Long Range Planning (Dan)
7. District Office Manager's Report
8. Old Business
 - Part-Time Grounds / Maintenance Tech. - Dominic Opatz
 - Beach Gate
 - Audit Selection
9. New Business
 - Interview Candidates for Open Board of Trustee Seat / Appointment
 - a. Sharon Denson
 - b. Cori Howell
10. Resident comments agenda item 3 minutes
11. Announcements for Clubs & Organizations
12. Adjournment

Pursuant to Section 286.26, Florida Statutes, and the Americans with Disabilities Act, any handicapped person desiring to attend this meeting should contact the District Manager at least 48 hours in advance of meeting to ensure that adequate accommodations are provided for access to the meeting.

Pursuant to Section 286.0105, Florida Statutes, should any person wish to appeal a decision of the Board with respect to any matter considered at this meeting, he or she will need to ensure that a verbatim record of the proceedings is made, including the testimony and evidence upon which the appeal is based.

Bayshore Gardens Park & Recreation District Profit & Loss Budget Performance

June 2023

Ordinary Income/Expense	Jun 23	Budget	Oct '22 - Jun 23	YTD Budget	Annual Budget
Income					
4000 · Assessments					
4005 · Property Tax	20,543.25	44,285.33	540,581.65	398,568.01	531,424.00
4006 · Commission fees	-616.30		-16,232.98	0.00	0.00
4007 · Excess fees (Excess commission fees)	0.00		3,145.53		
Total 4000 · Assessments	19,926.95	44,285.33	527,494.20	398,568.01	531,424.00
4100 · Rent					
4111 · Screen Room Rental	50.00	66.67	550.00	599.99	800.00
4120 · Hall Rentals	3,053.37	1,416.67	26,116.39	12,749.99	17,000.00
4150 · Marina Rentals					
4151 · Slip Rental					
4152 · Resident slip rentals	66.00	3,208.33	57,352.72	28,875.01	38,500.00
4153 · Non Resident slip rentals	0.00	5,958.33	132,601.50	53,625.01	71,500.00
4158 · Homeowner-Non Resident	0.00		0.00	0.00	0.00
Total 4151 · Slip Rental	66.00	9,166.66	189,954.22	82,500.02	110,000.00
4154 · Small Boat Area	96.00	83.33	2,592.00	750.01	1,000.00
4156 · Trailer Space Rental	0.00	250.00	6,660.00	2,250.00	3,000.00
4157 · Gate Keys	180.00	500.00	6,980.10	4,500.00	6,000.00
4162 · NR Boat Ramp	0.00	366.67	11,200.00	3,299.99	4,400.00
4825 · Work Area/Pressure Washer	60.00		1,858.60		
Total 4150 · Marina Rentals	402.00	10,366.66	219,244.92	93,300.02	124,400.00
Total 4100 · Rent	3,505.37	11,850.00	245,911.31	106,650.00	142,200.00
4300 · Pool					
4360 · Pool FOB	1,252.24		4,322.24	0.00	0.00
Total 4300 · Pool	1,252.24		4,322.24	0.00	0.00
4500 · Publications					
4520 · Banner - Subscriptions	20.00		175.00		
Total 4500 · Publications	20.00		175.00		
4600 · Interest Income (Interest Income)	356.11		3,022.32	0.00	0.00
4800 · Miscellaneous Income					
4802 · Office Services	0.00	4.17	144.00	37.49	50.00

Bayshore Gardens Park & Recreation District Profit & Loss Budget Performance

June 2023

	Jun 23	Budget	Oct '22 - Jun 23	YTD Budget	Annual Budget
4815 · Insurance Refunds	0.00		0.00		
4830 · Over/Short	0.00		1.00		
4800 · Miscellaneous Income - Other	0.00		8,037.43	0.00	0.00
Total 4800 · Miscellaneous Income	0.00	4.17	8,182.43	37.49	50.00
Total Income	25,060.67	56,139.50	789,107.50	505,255.50	673,674.00
Gross Profit	25,060.67	56,139.50	789,107.50	505,255.50	673,674.00
Expense					
5000 · Administration Expenses					
5100 · Wages, Taxes and Fees					
5120 · Wages - Administration	5,055.00	4,583.33	34,502.50	41,250.01	55,000.00
5130 · Wages - Maintenance	6,522.51	10,833.33	48,607.29	97,500.01	130,000.00
5132 · Wages - Dockmaster	969.24	750.00	6,246.20	6,750.00	9,000.00
5133 · Marina Project Manager	0.00		0.00		
5135 · Wages - Pool	4,490.00	4,500.00	5,217.50	40,500.00	54,000.00
5170 · Health Insurance Compensation	225.00	583.33	1,750.00	5,250.01	7,000.00
5210 · FICA-941 Taxes	1,320.56	1,666.67	7,382.31	14,999.99	20,000.00
5215 · Unemployment Taxes	66.58	50.00	398.08	450.00	600.00
5610 · Accounting Fees	1,000.00	1,125.00	8,200.00	10,125.00	13,500.00
6080 · Travel Mileage	0.00	41.67	0.00	374.99	500.00
Total 5100 · Wages, Taxes and Fees	19,648.89	24,133.33	112,303.88	217,200.01	289,600.00
Total 5000 · Administration Expenses	19,648.89	24,133.33	112,303.88	217,200.01	289,600.00
5200 · Marina Expense					
5240 · Sales Tax	0.00		-0.01		
5250 · Property Tax	0.00	516.67	3,486.43	4,649.99	6,200.00
5575 · Marina Repair/Maintenance	306.94	166.67	12,018.39	1,499.99	2,000.00
5200 · Marina Expense - Other	0.00		0.00		
Total 5200 · Marina Expense	306.94	683.34	15,504.81	6,149.98	8,200.00
5300 · Security					
5311 · Security Camera R&M	4,309.25	416.67	7,154.05	3,749.99	5,000.00
5300 · Security - Other	0.00		0.00		
Total 5300 · Security	4,309.25	416.67	7,154.05	3,749.99	5,000.00
5400 · Utilities					

Bayshore Gardens Park & Recreation District Profit & Loss Budget Performance

June 2023

	Jun 23	Budget	Oct '22 - Jun 23	YTD Budget	Annual Budget
5410 - Electric	4,877.63	1,375.00	12,982.18	12,375.00	16,500.00
5420 - Water/Sewer	1,442.05	1,433.33	11,967.51	12,900.01	17,200.00
5430 - Telephone	33.00	250.00	308.42	2,250.00	3,000.00
5440 - Gas/Propane	0.00	10.00	0.00	90.00	120.00
5460 - Internet	245.88	125.00	2,201.32	1,125.00	1,500.00
Total 5400 - Utilities	6,598.56	3,193.33	27,459.43	28,740.01	38,320.00
5500 - Building and Grounds					
5511 - Professional/Contract Services	2,409.40	733.33	5,053.30	6,600.01	8,800.00
5512 - Repairs, Maintenance & Supplies	751.97	675.00	8,127.88	6,075.00	8,100.00
5514 - Building Maintenance	-100.00	1,250.00	-100.00	11,250.00	15,000.00
5515 - Janitorial and Cleaning	592.73	250.00	3,247.36	2,250.00	3,000.00
5516 - Gasoline (Grounds machinery fuel)	0.00	66.67	320.63	599.99	800.00
5520 - Maintenance Equipment	0.00	250.00	3,501.93	2,250.00	3,000.00
5530 - Pest Control	105.00	83.33	503.00	750.01	1,000.00
5560 - Landscaping	0.00	1,916.67	6,572.89	17,249.99	23,000.00
5580 - Pool Maintenance	2,328.26	416.67	4,426.06	3,749.99	5,000.00
5585 - Pool Repair/Replacement	225.00	416.67	1,568.72	3,749.99	5,000.00
5590 - Pool Chemicals	3,104.15	2,083.33	9,401.40	18,750.01	25,000.00
5591 - EPA/Water	0.00	102.50	146.00	922.50	1,230.00
5683 - Certification Reimbursement	0.00	41.67	1,500.00	374.99	500.00
6500 - Playground Expense	0.00	208.33	2,940.00	1,875.01	2,500.00
Total 5500 - Building and Grounds	9,416.51	8,494.17	47,209.17	76,447.49	101,930.00
5600 - Other Administration Expense					
5519 - Leased Equipment	147.84	183.33	1,426.33	1,650.01	2,200.00
5650 - Postage	990.00	62.50	1,236.54	562.50	750.00
5660 - Legal Fees	600.00	833.33	2,380.00	7,500.01	10,000.00
5665 - Seminars, Training and Fees	0.00	83.33	175.00	750.01	1,000.00
5670 - Office Supplies/Expenses	613.09	750.01	4,137.15	6,749.97	9,000.00
5680 - Audit Fees	0.00	1,166.67	10,800.00	10,499.99	14,000.00
5682 - Organizational Fees and License	0.00	125.00	0.00	1,125.00	1,500.00
5686 - Website Maintenance	100.00	100.00	900.00	900.00	1,200.00
5690 - Advertising	32.76	58.33	793.78	525.01	700.00

Bayshore Gardens Park & Recreation District Profit & Loss Budget Performance

June 2023

	Jun 23	Budget	Oct '22 - Jun 23	YTD Budget	Annual Budget
6020 · Bank Fees	515.41	1,000.00	9,115.70	9,000.00	12,000.00
6040 · Trustee Election	0.00		0.00	0.00	0.00
Total 5600 · Other Administration Expense	2,999.10	4,362.50	30,964.50	39,262.50	52,350.00
5630 · Insurance-Business					
5631 · Insurance - Liability	2,648.25	833.33	7,944.75	7,500.01	10,000.00
5632 · Insurance - Workers Compensatio	3,023.25	1,166.66	9,069.75	10,500.02	14,000.00
5633 · Insurance - Auto Liability	65.50	20.83	196.50	187.51	250.00
5634 · Insurance -Property	6,673.75	2,562.50	20,021.25	23,062.50	30,750.00
5635 · Insurance -Marina	0.00		0.00	0.00	0.00
Total 5630 · Insurance-Business	12,410.75	4,583.32	37,232.25	41,250.04	55,000.00
5700 · Publications Expense					
5711 · Banner composition	410.00	375.00	3,960.00	3,375.00	4,500.00
5720 · Banner - Printing Costs	161.28		766.70		
5740 · Banner - Paper Delivery	45.00		405.00		
5750 · Banner - Office Supplies	0.00	208.33	114.00	1,875.01	2,500.00
Total 5700 · Publications Expense	616.28	583.33	5,245.70	5,250.01	7,000.00
5800 · District Recreation					
5830 · Expenses -	0.00	416.67	0.00	3,749.99	5,000.00
Total 5800 · District Recreation	0.00	416.67	0.00	3,749.99	5,000.00
5900 · Capital Layout					
5903 · Sheds to Replace Porta Potty	0.00	416.67	0.00	3,749.99	5,000.00
5907 · Basketball Court	0.00	5,375.17	0.00	48,376.49	64,502.00
5909 · Screen Room Repair	0.00		0.00	0.00	0.00
5911 · Pool Repairs	0.00		0.00	0.00	0.00
5917 · Pool ADA Bathrooms	1,500.00	2,231.00	1,500.00	20,079.00	26,772.00
5921 · Capital Layout Exercise Path	0.00		0.00	0.00	0.00
5922 · Hall Floors	0.00	1,250.00	0.00	11,250.00	15,000.00
5940 · Security Cameras	0.00		0.00	0.00	0.00
Total 5900 · Capital Layout	1,500.00	9,272.84	1,500.00	83,455.48	111,274.00
6900 · Uncategorized Expenses					
Total Expense	57,806.28	56,139.50	284,573.79	505,255.50	673,674.00
Net Ordinary Income	-32,745.61	0.00	504,533.71	0.00	0.00

Bayshore Gardens Park & Recreation District Profit & Loss Budget Performance

June 2023

	Jun 23	Budget	Oct '22 - Jun 23	YTD Budget	Annual Budget
Other Income/Expense					
Other Income					
10000 - Sales Tax Discount	10.50		140.45		
Total Other Income	10.50		140.45		
Net Other Income	10.50		140.45		
Net Income	-32,735.11	0.00	504,674.16	0.00	0.00

Bayshore Gardens Park & Recreation District
Balance Sheet
As of June 30, 2023

Jun 30, 23

ASSETS

Current Assets

Checking/Savings

1000 · Checking-Operating 5/3 2537	233,082.00
1004 · Petty Cash - District	350.00
1005 · Escrow Account 5/3 - 3919	36,000.00
1006 · Checking-Payroll 5/3 2545	52,858.26
1016 · Savings - Operating 5/3 4032	174,058.12
1019 · Savings Reserves 5/3 5013	
1021 · Reserve Fund-Roofing	14,607.39
1022 · Reserve Fund-Hall Upgrade	2,626.33
1022.5 · Building Maintenance	15,000.00
1023 · Reserve Fund-Pool	77,335.91
1024 · Reserve Fund - Wood Shop Exp	356.74
1025 · Reserve Fund - ADA	119,000.00
1027.5 · Basketball Court	56,000.00
1032 · Reserve Fund - Marina	140,638.60
1033 · Reserve Fund-Outdoor Recreation	25,000.00
1036 · Reserve Fund - Security System	10,000.00
1019 · Savings Reserves 5/3 5013 - Other	<u>-4,761.66</u>

Total 1019 · Savings Reserves 5/3 5013 455,803.31

Total Checking/Savings 952,151.69

Accounts Receivable

1100 · Accounts Receivable	<u>45,829.70</u>
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Total Accounts Receivable 45,829.70

Other Current Assets

11500 · Water Boy Bottle Deposit	35.00
11600 · A/R Lupson (gate repair)	150.00
1499 · *Undeposited Funds	<u>1,944.12</u>

Total Other Current Assets 2,129.12

Total Current Assets 1,000,110.51

Fixed Assets

1900 · Land	400,000.00
1910 · Buildings	1,307,197.93
1920 · Recreation Area	1,768,907.19
1940 · Recreation Area F & E	97,308.64
1960 · Machines & Equipment	94,144.21
1980 · Office Furniture and Equipment	36,158.54
1990 · Other Furniture and Equipment	53,448.88
1995 · Accumulated Depreciation	-1,195,385.52
1999 · Reserve Expenses	<u>139,455.39</u>

Total Fixed Assets 2,701,235.26

Other Assets

1800 · Utility Deposits	<u>280.00</u>
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Total Other Assets 280.00

Bayshore Gardens Park & Recreation District
Balance Sheet
 As of June 30, 2023

	Jun 30, 23
TOTAL ASSETS	<u>3,701,625.77</u>
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
2000 - Accounts Payable	27,804.76
Total Accounts Payable	<u>27,804.76</u>
Credit Cards	
2055 - Fifth Third CC	4,923.14
Total Credit Cards	<u>4,923.14</u>
Other Current Liabilities	
2010 - Accrued Wages	6,180.17
2100 - Payroll Liabilities	
2215 - SUTA Payable	-0.70
2220 - FUTA Payable	-4.20
2300 - Garnishment of Wages	-453.74
2100 - Payroll Liabilities - Other	-2,542.21
Total 2100 - Payroll Liabilities	<u>-3,000.85</u>
2171 - Sales Tax Payable	2,493.24
2500 - Security Deposits	
2501 - Hall Security Deposits	1,310.00
2502 - Marina Security Deposits	37,500.00
2503 - Screen Room Deposit (Screen Room Deposit)	-800.00
Total 2500 - Security Deposits	<u>38,010.00</u>
2600 - Deferred Revenues	46,682.59
2700 - Prepaid Income	665.65
2800 - Deposit on Boat Slips	750.00
Total Other Current Liabilities	<u>91,780.80</u>
Total Current Liabilities	<u>124,508.70</u>
Total Liabilities	124,508.70
Equity	
3040 - Owners' Equity	182,295.76
3050 - Retained Earnings (Retained Earnings)	1,884,416.67
3200 - Fund Balance	-86,517.97
3300 - Investment in GFAAG	1,092,248.45
Net Income	<u>504,674.16</u>
Total Equity	<u>3,577,117.07</u>
TOTAL LIABILITIES & EQUITY	<u>3,701,625.77</u>

DOMINIC OPATZ

MAINTENANCE WORKER

CONTACT ● EXPERIENCE

(941) 233-4680 **phone**
nickaopatz@gmail.com **email**
Bradenton, florida 34207 **address**

CAREER OBJECTIVE ●

I have been doing Maintenance and lawn care most of my working career, running lawn equipment, power tools and most pieces of heavy equipment. I have problem solving skills and hard working.

EDUCATION ●

May 1986
Oriska, Oriska North Dakota

January 2019 - Present

Owner Restore Roofing

Restore roofing, Bradenton, Florida

Power wash and clean tin roofs, replace bad screws patch bad spots, Caulk all screws Spray entire roof with acrylic white reflective coating. Treat shingle roof with all natural roof treatment that Rejuvenates shingle adding years of life.

April 2019 - October 2019

Maintenance And Lawn Care

Jungle Gardens, Sarasota, Florida

January 2012 - October 2018

Boiler Maintenance

BRC Construction, Spiritwood, North Dakota

Did all maintenance on boiler at powerplant and lawn care

SKILLS

- Roofing
- Maintenance
- Lawn care



District Office <office@bayshoregardens.org>

Gate Quote

Garry Brooks <garry@ciaaccess.com>
To: District Office <office@bayshoregardens.org>

Thu, Jul 6, 2023 at 9:42 AM

Gia,

The quote is attached. Please note that the gate is quoted in steel as an aluminum gate would have to be custom made and very expensive. I included a transmitter/receiver in the quote to allow the gate to be opened in "off-hours" for maintenance purposes or other reasons. If you do not want to include the transmitter/receiver please deduct \$140.00 from the quote.

Thank you,
Garry Brooks
CIA Access
O: 941-359-3707 x4
C: 941-321-7878

On Wed, Jun 28, 2023 at 10:42 AM District Office <office@bayshoregardens.org> wrote:
[Quoted text hidden]

2 attachments

 **Quote38416.pdf**
29K

 **VikingL-3.pdf**
6510K



Estimate

ESTIMATE # 38416

DATE 07/6/2023

CIA Access

P.O. Box 1403
Osprey, FL 34229

Ph 941 359 3707
service@ciaaccess.com
https://www.ciaaccess.com/

BILL TO Gia Cruz / Bayshore Gardens
6919 26th St. West
email invoices
office@bayshoregardens.org
Bradenton, FL 34207

JOB ADDRESS 6919 26th St. West
Bradenton, FL 34207

DESCRIPTION Provide and install cantilever steel gate for 12' opening x 4' tall with gate operator and timer.

Quote does NOT include:
- Bringing power (110VAC) to the gate operator

QTY ITEM

- 1 Steel chain link gate with 12 foot opening x 4 feet tall per customers specifications.
- 1 Viking L-3 Commercial Slide Gate Operator
- 1 Concrete pad 24 x 24 - Includes concrete, form boards, ground rod, stainless steel hardware, conduit entry, and install.
- 1 Polarized UL 325 listed photo beam with reflector. To ensure gate does not close on vehicles.
- 1 24/7 timer with daylight savings time
- 1 Receiver - Mini 2 Relays, Outdoor Housing. 433 MHz ...
- 2 Transmitter, Monarch w/Charge Guard, 318 MHz. 1 Button Key chain...
- 31 Labor units

SUBTOTAL	\$12,472.61
TAX	\$0.00
TOTAL	\$12,472.61

How To Accept

Estimate # 38416
Total amount \$12,472.61

To accept this quote, please call or email us using the details at the top of the page.

Thank you for your business, have a great day!

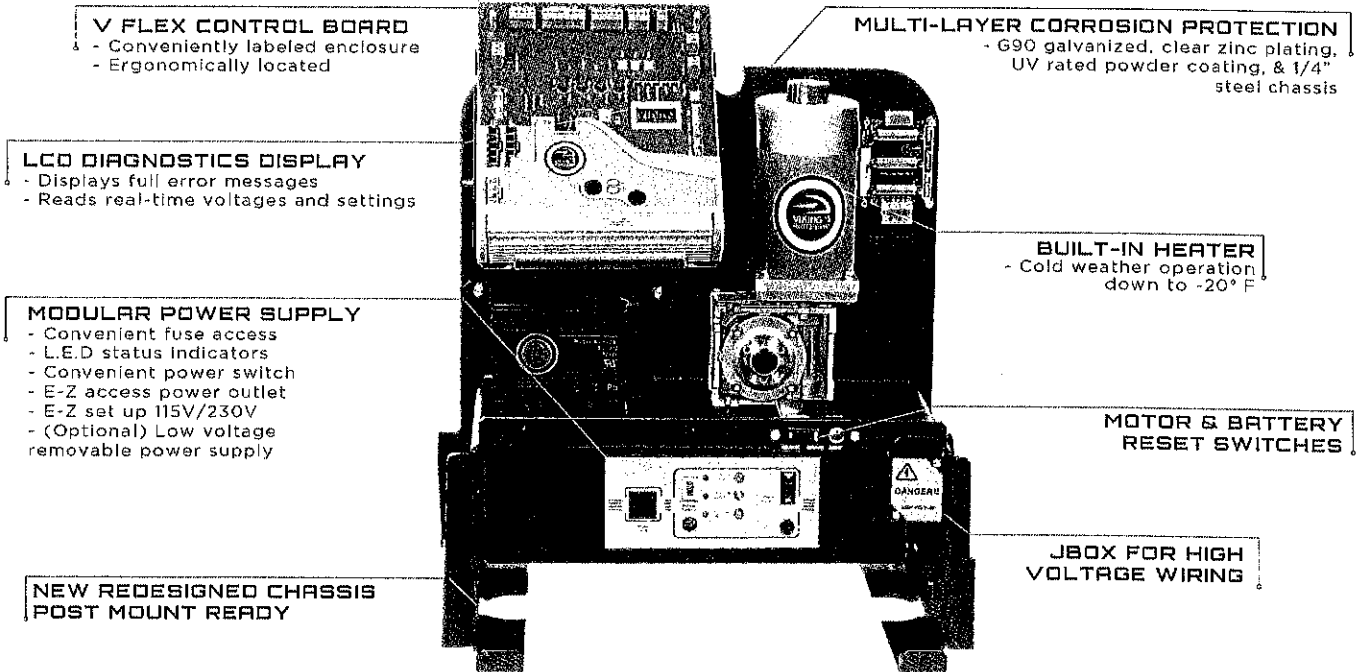


L-3 SLIDE GATE OPERATOR



RESIDENTIAL AND COMMERCIAL
CLASS I, II, III, & IV VEHICULAR SLIDE GATE OPERATOR

WARRANTY: 7 YR RESIDENTIAL & 5 YR COMMERCIAL



COMPATIBLE WITH VIKING WIRELESS PRODUCTS

- Wireless Master/Slave Kit provides secure and reliable wireless communication.
- Remote access to the control board settings, programming, operator diagnostics, controls, gate status and error notifications, all from the convenience of a computer or any compatible hand held device.
- Plug & Play connection for the Viking wireless expansion products.

BATTERY BACKUP INCLUDED

- Standard Battery Backup provides 100 continuous cycles at 100% duty cycle.
- With Viking's "True" Battery Backup System, batteries are not used during normal operations, maximizing battery life.

LIGHTNING PROTECTION

- Advanced lightning strike protection up to 20,000 volts / 10,000 amps
- On-board surge protection monitoring.

DIGITAL LIMITS

- Simple, push button limit setup.
- Adaptive Digital Limit control maintains open and close limit position during changing environments and power failures.

INTEGRATED HEATER

- Built-in heater for operating temperatures down to -20° F.
- This will allow you run your operator in the coldest conditions.

SOLAR SMART

- Power Saving technology minimizes current draw while at standby.

DIAGNOSTICS DISPLAY

- On-board LCD screen displays voltages, amps, gate status and diagnostics.

Operational Voltage	24 VDC with 1/2 HP Motor
Main Power Source Options	120/240 VAC Single Phase
Battery	7 AmpHr 12 VDC x 2
Battery Backup	100 Full Contin. Cycles (1600 lbs)

Operating Speed	12" per Second
Operating Temperature	-20°F up to +160°F
Max Gate Capacity	1600 lbs/ 60'
Max Duty Cycle	100% Contin. Cycle

www.vikingaccess.com • 800 908 0884



Fence Installation Quote

1 message

Sarasota Fence <sarasota.fence@gmail.com>

Wed, Jun 21, 2023 at 4:59 PM

To: "office@bayshoregardens.org" <office@bayshoregardens.org>

Hello,
Thank you for considering us for your fence project!
Please carefully read the email; it's lengthy but full of critical information.

Your quote is attached to this email. The price is guaranteed for the next 7 days, so please review it promptly. If you would like to move forward, we will need a signed copy of the contract and a 50% deposit before 5:00 PM on the 7th day. A verbal "go ahead" or only submitting one of these items will NOT be sufficient to proceed or extend the deadline. If you decide to proceed after this deadline, please check with us first to see if the price needs to be updated.

ALL NEWLY APPROVED JOBS ARE CURRENTLY BEING SCHEDULED FOR JULY-SEPTEMBER due to numerous factors outside of our control (weather, material availability, customers ahead of you being ready for installation, etc). This is subject to change, particularly if we receive your approval after the deadline. We do not offer a rush charge, and paying in full upfront will not advance your placement on the schedule. You will receive an update when we're ready to call for your (legally required) cable locate, which will provide you with 1-2 weeks' notice before we begin your project. Once your cable locate is cleared, we will be able to schedule an installation day. Please be advised that we are NOT responsible for any additional repairs that become necessary during this extended lead time. You will be charged accordingly; however, it will not impact your placement in the installation queue (providing that the materials are readily available).

Accepting The Contract: Be sure to initial/check any options you're proceeding with (if applicable), sign, and return via email (we accept original-size image files, .pdfs, scans, and clear, well-lit photos). Dropping off a signed hard copy in our secure mailbox is also acceptable. We can't receive faxes. We will not accept a contract with self-imposed changes, so be sure to ask any questions and submit any corrections or changes first so that we can issue a revised quote.

Paying The Deposit: You can drop off a check in our secure mailbox or request that we send a Square Invoice (via email) to pay with a credit card or bank transfer. Square is a secure payment processor and there are no additional fees. If necessary, you can make an appointment for us to pick up exact cash and provide a receipt. We cannot accept credit cards over the phone or in person, and do not accept any other payment methods (Zelle, Venmo, PayPal, Crypto, Bartering, etc). Please be advised that deposits are non-refundable due to materials being special-ordered and custom-built specifically for your project.

Mailing Contracts/Deposits: We can only receive mail from USPS (no signature required, absolutely no FedEx or UPS); however, this is at your own risk, and we are not responsible for any delays in receiving items via mail.

Our mailing/box address is our workshop which is NOT open to the public. There is no showroom, office, or store at this location. We do not sell materials only. Please only go to drop off a signed contract and/or check in the secure mailbox near the road and do not attempt to enter the shop; there are signs posted. If the gate is open, it is because we are expecting a delivery and you will be blocking the way.

HOA/ARC Residents: It is your duty to be familiar with and advise us of your community's rules. Filling out the application is your responsibility, and we will provide supplemental documents only after we've received a signed contract and deposit for a single pre-approved option. Please be advised that we will not proceed without HOA approval; if a project is denied without amenable alternatives, we will refund your deposit. If you submit for HOA approval without providing us with a signed contract and deposit, then we are not responsible for any delays caused by the HOA, and your contract will be subject to any material cost increases and lead time delays.

Involving Neighbor(s): You are personally and solely responsible for the full amount on your contract. If you have received an option for, or are splitting the cost with a neighbor, please understand that is a personal matter, and you must be reimbursed by them. We cannot accept changes, payments, or attempt to collect from anyone not on the contract.

Once we receive your approval, we will process it, and you will receive an acknowledgment email by the upcoming Saturday. We update our installation schedule each Saturday; after making any necessary adjustments to the installation schedule, new approvals are added in the order in which they were received, so your placement on the schedule will be secured.

Please respond to this email with any questions or changes, so we have a written record. Revised quotes will be

Sarasota Fence INC. ®

2131 13th Street • Sarasota, FL 34237
(941) 351-8989
sarasota.fence@gmail.com

Att: Gia Cruz

PROPOSAL SUBMITTED TO:		PHONE 755-1912	DATE 6-21-23
NAME Bayshore Garden Park	JOB NAME		AREA
STREET 6828 26th St. W.	STREET		
CITY Bradenton	ALT		
STATE Florida	EMAIL office@bayshoregardens.org		

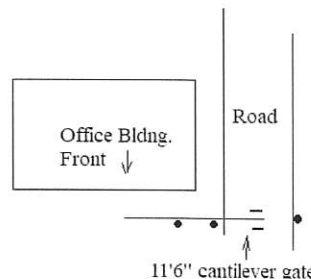
We hereby submit specifications and estimate for:

Install 1-4'x11'6" cantilever gate black vinyl chain link
3-4"x8" sch. 40 posts, hvy duty nylon canti- wheels **\$4,850.00**
Concrete each post 18" diameter x 42" deep.

Same as above specified using aluminum gate & posts **\$8,955.00**

Gate operator set to open automatically dawn to dusk

Using Viking unit: **\$6,475.00**
Using Lift Master unit: **\$5,800.00**
Gate transmitters **\$50.00 ec.**



Gate Size/Walk _____ drive 1-4'x11'6" canti-lever
Gate Style/Design Black Vinyl Chain Link
Gate frames: steel _____ vinyl coated X
Gate Post Length: 8' X 10' _____ 12' _____ other _____
Gate Post Size: 2.1/2" _____ 2" _____ 1.5/8" _____ other 4" (Concreted)
Existing: take down _____ ? _____ haul away _____
Permit: yes _____ no X (DEED RESTRICTIONS) _____
Survey Provided: yes _____ no _____ not required X
IF NO, CUSTOMER ASSUMES RESPONSIBILITY FOR LOCATION OF FENCE
Fenceline must be cleared before installation and is customer's responsibility
Failure to do so may result in additional charges, and we are unable to haul away yard waste.

We hereby propose to furnish labor and materials - complete in accordance with the above specifications, for the sum of _____ dollars (\$ _____) with payment to be made as follows:
(\$ 1/2) Deposit, Balance due upon completion. _____

All material is guaranteed to be as specified. All work to be completed in a workmanlike manner according to standard practices. Any alteration or deviation from above specifications involving extra cost, will be executed only upon verbal _____ orders and will become an extra charge over and above the estimate. All agreements contingent upon strikes, accident or delays beyond our control. This proposal subject to acceptance within 7 days with the required deposit and is void thereafter at the option of the undersigned.

Sarasota Fence, Owners & Employees shall not be responsible for damage to underground utility lines, piping, sprinklers systems or other structures upon the Contractee's premises. Further they shall not be liable for removal, damages, or nonpayment for installation of fencing upon properties adjacent to Contractee's property or inaccurately placed fencing upon Contractee's property when the Contractee instructs or delegates instruction to Contractor of the location of fencing. Contractor specifically discloses that they make no representation of practicing surveying or in any fashion delineating lot lines for the purpose of installing fences. It is the Contractee's responsibility to have a valid lot survey to locate legal boundaries and knowledge of their private fencing deed restrictions.

Authorized Signature: Orlando Tellez

ACCEPTANCE OF PROPOSAL

The above prices, specifications and conditions are hereby accepted. You are authorized to do the work as specified. Payment will be made as outlined above. There will be a service charge of 5% of face value for all returned checks. Minimum charge \$30.00. We reserve the right to repossess our fence if full payment is not made within 30 days from completion of the job. A monthly service charge of 1.5% (18% per annum) will be added to any invoice not paid within 30 days. The Contractee also agrees to pay the costs of collection and the reasonable cost of Contractor's legal fees in the event that the Contractor prevails in legal action to enforce payment of charges owing to Contractor for service provided by Contractor to Contractee. Deposits are not refundable.

Signature _____
DATE _____ Signature _____

made with current pricing and the date of the revisions, guaranteeing the price for another 7 days from receipt.

I look forward to working with you!

O.T.



2131 13th St. | Sarasota, FL | 34237

(941) 351-8989

Business hours are Monday - Friday, 9:00 AM - 5:00 PM



bayshore garden park or barbara susdorff.JPG

367K

3



Bradenton (941) 756-8727
Tampa (813) 677-4411
Englewood (941) 697-3345

State License CRC 016172, CCC 014577, CBC 1262677
Charlotte County License AAA0010138

JOB WORK ORDER

CONTRACT

BUYER: Property Owner Not Property Owner

Date: 3-10-23

Buyer's Name BOYSHORE GARDENS PARK
E RECREATION RESTAURANT

Mail Address 6919 26th ST W
BADDELTON FL 34207

Phone Number 941-755-1912 (941-713-5850)

Installation Address: same

Installed in the County of MONROE

City of _____

ITEMIZED MATERIALS AND / OR SERVICES

Remove EX- Gate AND Costs
+ TAKE AWAY

INSTALL

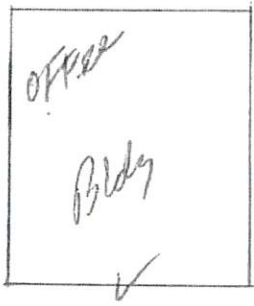
1- 4'x12' Cantilever Roll
Gate in Black Vinyl
CHAIN LINK

2- 4" S&H 40 Gate Post
INSTALL 31' OF 4' TALL in
Black Vinyl Chain Link
Fence

MECHANIC		HOURS	DATE COMPLETED		
CL	WD	VYL	ORN	ACC	PERMIT
Gauge	<input type="checkbox"/> 9	<input type="checkbox"/> 11 1/2	<input type="checkbox"/> Reg.		
Knuckled	<input type="checkbox"/>	<input type="checkbox"/> Safeguard			
Corner Post	_____	O.D.	Top Rail	_____	O.D.
Walk Gate Post	_____	O.D.	Line Post	_____	O.D.
Drive Gate Post	_____	O.D.	End Post	_____	O.D.
Gate Frames	_____	O.D.			
Top Rail of Fence to Follow Ground		<input type="checkbox"/>			
Be Level With:		<input type="checkbox"/> Lowest Grade	<input type="checkbox"/> Highest Grade		

Part #	Description	Qty.	Cost
	Remove all POST		
	<u>Total \$5972.98</u>		
	* Gate OPERATOR INSTALL <u>\$5531.80</u>		

Park



ASPHALT
Cantilever
Roll Gate
31'
ENT

CANDY _____ FPL

I hereby acknowledge the satisfactory completion of the above described work

CUSTOMER _____ DATE _____

BAYSHORE GARDENS BOARD OF TRUSTEES MEETING MINUTES AUGUST 21, 2018

Item 1. Roll Call - The roll call was performed. Trustees present were Jim Couey, Suzanna Young, Terry Zimmerly, Dan Rawlinson, Sharon Denson, Steve Watkins, and Don Gassie. A quorum was established. Barbara Susdorf arrived later.

Item 2. Call to Order - The meeting was called to order by Chairman Sharon Denson at 7:00 PM.

Item 3. Pledge to Flag - Sharon led attendees in the pledge of allegiance to the flag.

Item 4. Approval of Minutes - Steve moved to approve the minutes from the Board of Trustee Meeting on Sunshine Law on August 7, 2018. Dan seconded the motion. **MOTION PASSED.**

Dan moved to approve the minutes for the August 8, 2018 BOT Workshop. Steve seconded, **MOTION PASSED.**

Dan moved to approve the minutes for the July 17, 2018 Board of Trustee Meeting. Steve seconded, **MOTION PASSED.**

Item 5. Treasurer Report. Terry discussed the profit and loss balance sheet and pending changes to several account categories. Terry moved to accept the Report, Jim Couey seconded, **MOTION PASSED.** There was further discussion that a resolution should be made at the next meeting to move funds. Terry may hold a work session concerning the needed moves.

Item 6. Additional agenda items. None

Item 7. Trustee Committee Reports.

ADA Compliance Committee - Don Gassie reported that a several years ago the District had hired Jack Humburg to do an ADA compliance analysis. He is in charge of ADA at the Boley Center and does ADA consulting for the county. The agreed upon \$1200 fee for Mr. Humburg's services was never paid as he was 80 to 90% complete with the analysis. Dan made a motion to reaffirm the original \$1200 contract with Jack Humburg, Steve seconded. After further discussion, **MOTION PASSED** unanimous.

Item 8. Special Committee Reports. None.

Item 10. Labor Day Jim Couey reported on the Labor Day event Committee. Jim stated Jim Frost had been very helpful on the committee. The next meeting is the Labor Day Event Planning is on August 29, 7:00pm for all volunteers. Sharon asked the other committees to hold off their meetings that night to allow the Labor Day Event Committee have full participation in this last coordination/planning meeting.

Added Items: A. Terry stated that the Dock Master checked the channel markers and reported we have 15 markers and one pole that needs to be replaced. Total cost will be about \$1,689.60 (signs are approximately \$95/each). Trailer Estates has agreed to pay half of the cost. Terry moved to buy the 15 signs and one pole. Jim Couey seconded, **MOTION PASSED.**

B. Terry stated Coastal Engineering (design for outside docks) needs to create another proposal before he can continue with another design RFP. There is no change to the design.

C. Boat Ramp – Suzanna said the Engineer needs to send in the RFP to the Boat Ramp. Jodie will make sure the Trustees get a copy to review. Terry suggested reviewing the RFP before advertising for bids. Maynard Boyce said there is a list of eight or nine contractors to approach. Also our seawall contractor (Marine or Water Engineering) did good work and on time.

Sharon moved to put a notice in the paper to get bids on the boat ramp. Jim seconded, **MOTION PASSED.**

D. Future Planning Committee - Suzanna stated that a baseline is needed to establish a future plan that includes physical, and operational components. Life expectancies need to be determined. The community is urged to suggest ideas when the committee meets.

Item 9. Security System. Steve stated we are going from a card swiping system to a Fob system. He has given two briefings at committee Meetings and one at a Workshop. His committee recommends the Tempus Pro Services system after reviewing the system at-work at Tri-Par Estates. Tri-Par has had the current system working for three years and an earlier version for 13 years. The Tempus quote is \$13,382.51 for 2 vehicle gates at the marina, center pier walk through gate, and the Pool gate. Steve provided a list of ancillary equipment and electrical work required to complete the project. The total cost is \$14,406.60. Jim moved to purchase the system and components. Steve seconded, **MOTION PASSED.**

Item 11. District Manager Response to Trustees Jodie would like a clean-up day established with each club which includes the hall, closets, storage room, and kitchen. She is asking each club to call the office to set best dates, even Saturday or a week night. Jodie is making a 'contact list' for club officers. Clubs are urged to provide the info at earliest convenience. The jazzercise classes have been held in the rec hall for about ten years and there is no contract on file. The contractor is being charged \$107 (includes taxes) per month. Sharon said that Policies and Procedures Meeting will take up the rental issue in September. Jodie asked the Board to use three or four pizzas (purchased by coupons) be used for the Labor Day Event volunteers Planning Meeting on August 28th. Sharon made a motion to use 4 coupons for the meeting. Steve seconded, **MOTION PASSED.** Dan asked that maintenance personnel be on-duty Labor Day as they have access to the equipment. Steve said they also have access to the irrigation system that needs to be turned off for the event. Jodie said she has been blocked in her designated parking spot by vehicles and asked that the adjacent parking spot be changed to an 'emergency vehicle parking only'. Sharon moved to purchase a sign not to exceed \$200. Don seconded, **MOTION PASSED.**

OLD BUSINESS

Item 12. Appointment Future Planning Committee. Sharon appointed Suzanna as Chairman to the Committee and Holly Crouse and Debbie Korell as members. The committee will plan for future years of the District. Sharon stated that the Committee's Agenda must be submitted for the website at least 8 days in advance of a meeting. Available posted Committee Meeting dates are the first Wednesday or fourth Tuesday of each month.

Item 13. Auditor Selection Committee Report. Belle Baxter, Chairman of the Committee thanked the group for the opportunity to serve the community and the committee members for their work. She stated five proposals were received from the advertisement and three were selected for consideration of the Board: Mauldin Jenkins first, Braxton & Holway second, and Grau & Associates final. She stated the **Committee recommends Mauldin Jenkins. Sharon moved to go with Mauldin Jenkins (\$10,900). Jim seconded, MOTION PASSED.** Sharon thanked Belle for all of her hard work on this Committee.

After a five minute break, the meeting continued with a discussion on distribution the many copies of the Legislative Bill created for our Special Taxing District. The community is urged to pick some up at the District office. There will be copies available at the Labor Day Event

Items 14. Through 16. Marina Contracts 1005C, 1005MRR, 1005P, 1019A(WS#4); Revised 1005A Marina Work Area (WS#7); Revised 1005SBA Small Boat Area contract (WS#4) Sharon stated the marina contracts go out at the first of the month. They will be emailed and placed on the web. The slip renters

BAYSHORE GARDENS PARK AND RECREATION DISTRICT
AUDITOR SELECTION POLICY

1016P

s. 218.39.

(2) *The governing body of a charter county, municipality, special district, district school board, charter school, or charter technical career center shall establish an audit committee..... The primary purpose of the audit committee is to assist the governing body in selecting an auditor to conduct the annual financial audit required in s. 218.39; however, the audit committee may serve other audit oversight purposes as determined by the entity's governing body. The public shall not be excluded from the proceedings under this section.*

Bayshore Gardens Park and Recreations shall appoint an Auditor Selection Committee consisting of at least three members of the District. Residents will be a priority over Trustees. If residents do not volunteer, and the appointments selected from the Board of Trustees, the Treasurer shall not serve on this committee.

Approved

Revised

Effective

5-15-98

[Signature]

5-15-18

The Florida Senate

2018 Florida Statutes

<u>Title XIV</u> TAXATION AND FINANCE	<u>Chapter 218</u> FINANCIAL MATTERS PERTAINING TO POLITICAL SUBDIVISIONS <u>Entire Chapter</u>	SECTION 391 Auditor selection procedures.
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218.391 Auditor selection procedures.—

(1) Each local governmental entity, district school board, charter school, or charter technical career center, prior to entering into a written contract pursuant to subsection (7), except as provided in subsection (8), shall use auditor selection procedures when selecting an auditor to conduct the annual financial audit required in s. 218.39.

(2) The governing body of a charter county, municipality, special district, district school board, charter school, or charter technical career center shall establish an audit committee. Each noncharter county shall establish an audit committee that, at a minimum, shall consist of each of the county officers elected pursuant to s. 1(d), Art. VIII of the State Constitution, or a designee, and one member of the board of county commissioners or its designee. The primary purpose of the audit committee is to assist the governing body in selecting an auditor to conduct the annual financial audit required in s. 218.39; however, the audit committee may serve other audit oversight purposes as determined by the entity's governing body. The public shall not be excluded from the proceedings under this section.

(3) The audit committee shall:

(a) Establish factors to use for the evaluation of audit services to be provided by a certified public accounting firm duly licensed under chapter 473 and qualified to conduct audits in accordance with government auditing standards as adopted by the Florida Board of Accountancy. Such factors shall include, but are not limited to, ability of personnel, experience, ability to furnish the required services, and such other factors as may be determined by the committee to be applicable to its particular requirements.

(b) Publicly announce requests for proposals. Public announcements must include, at a minimum, a brief description of the audit and indicate how interested firms can apply for consideration.

(c) Provide interested firms with a request for proposal. The request for proposal shall include information on how proposals are to be evaluated and such other information the committee determines is necessary for the firm to prepare a proposal.

(d) Evaluate proposals provided by qualified firms. If compensation is one of the factors established pursuant to paragraph (a), it shall not be the sole or predominant factor used to evaluate proposals.

(e) Rank and recommend in order of preference no fewer than three firms deemed to be the most highly qualified to perform the required services after considering the factors established pursuant to paragraph (a). If fewer than three firms respond to the request for proposal, the committee shall recommend such firms as it deems to be the most highly qualified.

(4) The governing body shall inquire of qualified firms as to the basis of compensation, select one of the firms recommended by the audit committee, and negotiate a contract, using one of the following methods:

(a) If compensation is not one of the factors established pursuant to paragraph (3)(a) and not used to evaluate firms pursuant to paragraph (3)(e), the governing body shall negotiate a contract with the firm ranked first. If the governing body is unable to negotiate a satisfactory contract with that firm, negotiations with that firm shall be formally terminated, and the governing body shall then undertake negotiations with the second-ranked firm. Failing accord with the second-ranked firm, negotiations shall then be terminated with that firm and undertaken with the third-ranked firm. Negotiations with the other ranked firms shall be undertaken in the same manner. The governing body, in negotiating with firms, may reopen formal negotiations with any one of the three top-ranked firms, but it may not negotiate with more than one firm at a time.

(b) If compensation is one of the factors established pursuant to paragraph (3)(a) and used in the evaluation of proposals pursuant to paragraph (3)(d), the governing body shall select the highest-ranked qualified firm or must document in its public records the reason for not selecting the highest-ranked qualified firm.

(c) The governing body may select a firm recommended by the audit committee and negotiate a contract with one of the recommended firms using an appropriate alternative negotiation method for which compensation is not the sole or predominant factor used to select the firm.

(d) In negotiations with firms under this section, the governing body may allow a designee to conduct negotiations on its behalf.

(5) The method used by the governing body to select a firm recommended by the audit committee and negotiate a contract with such firm must ensure that the agreed-upon compensation is reasonable to satisfy the requirements of s. 218.39 and the needs of the governing body.

(6) If the governing body is unable to negotiate a satisfactory contract with any of the recommended firms, the committee shall recommend additional firms, and negotiations shall continue in accordance with this section until an agreement is reached.

(7) Every procurement of audit services shall be evidenced by a written contract embodying all provisions and conditions of the procurement of such services. For purposes of this section, an engagement letter signed and executed by both parties shall constitute a written contract. The written contract shall, at a minimum, include the following:

(a) A provision specifying the services to be provided and fees or other compensation for such services.

(b) A provision requiring that invoices for fees or other compensation be submitted in sufficient detail to demonstrate compliance with the terms of the contract.

(c) A provision specifying the contract period, including renewals, and conditions under which the contract may be terminated or renewed.

(8) Written contracts entered into pursuant to subsection (7) may be renewed. Such renewals may be done without the use of the auditor selection procedures provided in this section. Renewal of a contract shall be in writing.

History.—s. 65, ch. 2001-266; s. 1, ch. 2005-32.

Disclaimer: The information on this system is unverified. The journals or printed bills of the respective chambers should be consulted for official purposes.

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Audit Selection

5 messages

District Office <office@bayshoregardens.org>
To: Scott Rudacille <srudacille@blalockwalters.com>

Thu, Jun 29, 2023 at 3:12 PM

Good Afternoon Scott,

I was asked to email you regarding the selection of our new auditors. The Board appointed four residents as members of the audit selection committee with Sharon Denson as the chair.

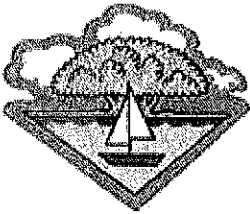
Eleven RFPs were sent out, but we only received two proposals. The committee interviewed the two companies and made a selection which Mrs. Denson presented to the Board last night. Mrs. Denson made it clear the committee made a decision and the Board was advised by her, no vote was necessary.

The question is, can the committee select who the District uses? The last time we had an audit selection committee was in 2018 and they gave their recommendations to the Board, but in the end the Board still voted on who they wanted.

Thank you,

Gia Cruz

District Office Manager



Bayshore Gardens Park & Recreation District

6919 26th Street W.

Bradenton, FL 34207

office@bayshoregardens.org

Phone: (941) 755-1912

Fax: (941) 739-3515

Under Florida law, e-mail addresses are public records. If you do not want your e-mail address released in response to a public records request, do not send electronic mail to this entity. Instead, contact this office by phone or in writing.

Marisa Powers <MPowers@blalockwalters.com>
To: District Office <office@bayshoregardens.org>
Cc: Scott Rudacille <srudacille@blalockwalters.com>

Thu, Jun 29, 2023 at 4:29 PM

Hi Gia,

Are there policies and procedures relating to this committee? If there aren't any specific to the audit committee, can you send me the general policies and procedures relating to committees of the District. It sounds from the way it was handled last time that the audit committee is meant to be an advisory/recommending committee and that the Board has the ultimate authority to award a contract. But, I would need to see the relevant documents to confirm.

Thank you,
Marisa

Marisa J. Powers | Attorney



802 11th Street West | Bradenton, FL 34205
2 North Tamiami Trail, #408 | Sarasota, FL 34236

Office 941.748.0100 | Facsimile 941.745.2093
mpowers@blalockwalters.com

To ensure compliance with Treasury Department regulations, we advise you that, unless otherwise expressly indicated, any tax advice contained in this communication (including any attachments) was not intended or written to be used, and cannot be used, for the purpose of (i) avoiding tax-related penalties under the Internal Revenue Code or applicable state or local tax law provisions or (ii) promoting, marketing or recommending to another party any tax-related matters addressed herein.

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From: Scott Rudacille <srudacille@blalockwalters.com>
Sent: Thursday, June 29, 2023 4:12 PM
To: Marisa Powers <MPowers@blalockwalters.com>
Subject: Fwd: Audit Selection

Sent from my iPhone

Begin forwarded message:

From: District Office <office@bayshoregardens.org>
Date: June 29, 2023 at 3:12:39 PM EDT

To: Scott Rudacille <srudacille@blalockwalters.com>
Subject: Audit Selection

[Quoted text hidden]

District Office <office@bayshoregardens.org>
To: Marisa Powers <MPowers@blalockwalters.com>
Cc: Scott Rudacille <srudacille@blalockwalters.com>

Fri, Jun 30, 2023 at 9:09 AM

Good Morning Marisa,

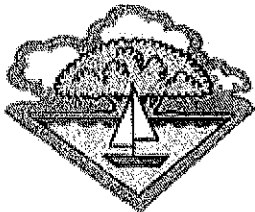
I have attached the Auditor Selection Policy in this email. Mrs. Denson stated at the Board meeting, by law the auditor selection committee selects the auditors?

Please let me know if you need anything further on our end.

Thank you,

Gia Cruz

District Office Manager



Bayshore Gardens Park & Recreation District

6919 26th Street W.

Bradenton, FL 34207

office@bayshoregardens.org

Phone: (941) 755-1912

Fax: (941) 739-3515

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[Quoted text hidden]

 **Auditor Selection Policy - 1016P.pdf**
20K

Marisa Powers <MPowers@blalockwalters.com>
To: District Office <office@bayshoregardens.org>
Cc: Scott Rudacille <srudacille@blalockwalters.com>

Fri, Jun 30, 2023 at 10:10 AM

Auditor Selection Committee
Bayshore Gardens Park & Recreation District
Report to the Board
June 28, 2023

The Auditor Selection Committee has selected the following Firm for the FY 2022/2023 audit,

Gardner-Thomas
3431 Magic Oak Lane
Sarasota, Fl 34232
Phone 941-229-3431

The Committee has made the selection of Gardner-Thomas (part of the proposal from Hernden-Trapp-& Westfall LLC) for the following reasons:

1. The auditor Kim Gardner is the owner of the firm
2. The Firm is local
3. Kim Gardner was able to answer all of our questions and concerns
4. The Committee determined that it is a good business practice to change firms occasionally.
5. The Committee determined that with a new firm a one year contract would give the auditor and the District and opportunity to decide if the firm and District are a good fit
6. . Compliance with FS 218.391(4(a).”the government shall negotiate a contract with the firm ranked first.....”
7. Engagement Letter (Contract) attached.

The District will offer a one year contract. The Auditor Selection Committee shall remain active to oversee the audit and hold an exit interview when audit is complete. The Committee shall determine whether the contract will continue for an additional one to four years or start the process of selection of an auditor per Board policy.

The Bayshore Gardens Board of Trustees shall submit the Engagement Letter to the Attorney for approval before letter is signed, per Board of Trustee policy.

Respectfully Submitted,

Sharon Denson

Sharon Denson, Chair
Auditor Selection Committee

Attachments: Spreadsheet of Balance Sheet
FS 218.33



District Office <office@bayshoregardens.org>

Auditor Opinion (confidential)

1 message

Natalie Sauter <natalie@npsbasi.com>
To: District Office <office@bayshoregardens.org>

Wed, Jul 12, 2023 at 12:15 PM

To the Board of Directors of the Bayshore Park and Recreation District.

I have been asked to provide an opinion regarding the two firms that have responded to the bid for the coming year audit.

Mauldin and Jenkins: Have been our auditors for many years and have been very proficient and knowledgeable. The audits have been very in depth and thorough. They have just had a new Partner come on board that is an expert with governmental and special district accounting. I have worked with this respected firm with other clients and it would be my recommendation that we continue using their services.

Gardner and Thomas I do want to disclose that Tom Thomas is a personal acquaintance of mine and due to that fact have attempted to use his firm for tax return purposes. However and unfortunately their performance has not been up to standards. Do not wish to provide details but their communication skills are abysmal and the office is not well structured. Looking at their quotation, the fee amount would be more consistent with a compilation rather than a full in depth audit. I would not recommend their services.

Respectfully submitted;

NATALIE PATRICIA SAUTER
President

NPSBASI
Natalie Patricia Sauter Accounting Services, Inc.
PO Box 3025, Sarasota, FL 34230-3025
USA

Voice: 941-350-9800
Email: natalie@npsbasi.com

HERNDEN, TRAPP, WESTFALL & GARDNER, LLC

CERTIFIED PUBLIC ACCOUNTANTS

May 2, 2023

Bayshore Gardens Park and Recreation District
6919 26th Street W
Bradenton, FL 34207

To the Board of Directors

We were contacted by someone in your organization about submitting a proposal for and audit of Bayshore Gardens Park and Recreation District. Our firm is located on 26th street in West Bradenton, close to Bayshore gardens. Kimeth Gardner CPA owns Hernden, Trapp, Westfall and Gardner. Kim Gardner also owns a Sarasota firm named Gardner & Thomas CPAs. In collaboration with these 2 firms, we would like to present to you the attached engagement letter to perform an audit of the books at Bayshore Gardens Park and Recreation District.

Our audit clientele includes several homeowner's associations and condo owner's associations, which I think would be similar to how your organization operates. Kim Gardner and Chad Bailey both have several years of audit experience in every aspect of financial statement audit.

We believe that the audit of your books would take 1 or 2 days of onsite field work. The total process from start to finish would take roughly 2 weeks. Your year end is September 30th, which is close to the personal tax extension deadline of October 15th. We could begin the audit around the 3rd or 4th week of October and have everything completed by November 15th.

We look forward to working with your organization now and in the future.

Feel free to reach out to either of us if you have any questions.

Sincerely,



Chadwick A Bailey



GARDNER+THOMAS
Certified Public Accountants & Associates

May 1, 2023

Board of Directors
Bayshore Gardens Park and Recreation District

We are pleased to confirm our understanding of the services we are to provide for Bayshore Gardens Park and Recreation District, for the year ended September 30, 2023:

We will audit the balance sheet of Bayshore Gardens Park and Recreation District as of September 30, 2023, and the related statements of revenues and expenses, equity, and cash flows for the year then ended.

Our audit will be made in accordance with generally accepted auditing standards and will include tests of your accounting records and other procedures we consider necessary to enable us to express an unqualified opinion that the financial statements are fairly presented, in conformity with generally accepted accounting principles. If our opinion is other than unqualified, we will fully discuss the reasons with you in advance.

Our procedures will include tests of documentary evidence supporting the transactions recorded in the accounts, tests of the physical existence of assets, and direct confirmation of receivables and certain other assets and liabilities by correspondence with selected creditors and banks. We may request written representations from your attorneys as part of the engagement, and they may bill you for responding to this inquiry. At the conclusion of our audit, we will also request certain written representations from you about the financial statements and related matters.

An audit includes examining, on a test basis, evidence supporting the amounts and disclosures and disclosures in the financial statements; therefore, our audit will involve judgement about the number of transactions to be examined and the areas to be tested. Also, we will plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement.

However, because of the concept of reasonable assurance and because we will not perform a detailed examination of all transactions, there is a risk that material errors, irregularities, or illegal acts, including fraud or defalcations, may exist and not be detected by us. Our responsibility as an auditor is limited to the period covered by our audit and does not extend to any later periods for which we are not engaged as auditors.

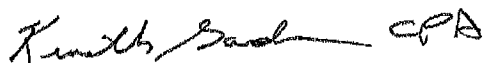
We understand that you will provide us with the basic information required for our audit, also that you are responsible for the accuracy and completeness of the information.

We understand that you will provide us with the basic information required for our audit, also that you are responsible for the accuracy and completeness of the information. We will advise you about appropriate accounting principles and their application and will assist in the preparation of your financial statements, but the responsibilities for the financial statements remain with you. This responsibility includes the maintenance of adequate records and related internal control policies and procedures, the selection and application of accounting principles, and the safeguarding of assets.

Our audit is not specifically designed and cannot be relied on to disclose reportable conditions, that is, significant deficiencies in the design or operation of the internal control structure. However, during the audit, if we become aware of such reportable conditions or ways that we believe management practices can be improved, we will communicate them to you in a separate letter. Our fees for these services will be based on the actual time spent at our standard hourly rates, plus travel and other out-of-pocket costs such as report production, typing, postage, etc. Our standard hourly rates vary according to the degree of responsibility involved and the experience level of the personnel assigned to your audit. The total fee to be in the \$4,900 - \$6,200 range, which includes additional time required to review the information on the prior fiscal year financial statements.

We appreciate the opportunity to be of service to you and believe this letter accurately summarizes the significant terms of our engagement. If you agree with the terms of our engagement as described in this letter, please sign the enclosed copy and return it to us, and this letter will continue in effect until canceled by either party.

Sincerely,



Gardner & Thomas
Certified Public Accountants

RESPONSE:

This letter correctly sets forth the understanding of Bayshore Gardens Park and Recreation District

Signature: _____

Title: _____

Date: _____



GARDNER + THOMAS
Certified Public Accountants & Associates

May 1, 2023

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Bayshore Gardens Park and Recreation District

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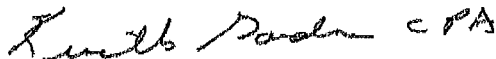
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Sincerely,



Gardner & Thomas
Certified Public Accountants

RESPONSE:

This letter correctly sets forth the understanding of Bayshore Gardens Park and Recreation District

Signature: _____

Title: _____

Date: _____



Dollar Cost Proposal¹

As requested by the District, we propose an all-inclusive maximum fee of \$13,500 for the financial and compliance audit services for the fiscal year ending September 30, 2023. A table of audit fees for the fiscal years 2023 through 2027 are below:

SCHEDULE OF PROFESSIONAL FEES AND EXPENSES			
FOR THE AUDIT OF THE 2023 FINANCIAL STATEMENTS			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Total</u>
Partners	40	\$280	\$ 11,200
Managers	50	180	9,000
Staff Professionals	35	150	5,250
Total for Services Described In RFP	<u>125</u>		<u>25,450</u>
Mauldin & Jenkins discount from standard fees and expenses			<u>(11,950)</u>
Total all inclusive not to exceed price for 2023 audit			<u>\$ 13,500</u>

SCHEDULE OF PROFESSIONAL FEES AND EXPENSES			
FOR THE AUDIT OF THE 2024 FINANCIAL STATEMENTS			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Total</u>
Partners	40	\$285	\$ 11,400
Managers	50	185	9,250
Staff Professionals	35	155	5,425
Total for Services Described In RFP	<u>125</u>		<u>26,075</u>
Mauldin & Jenkins discount from standard fees and expenses			<u>(12,075)</u>
Total all inclusive not to exceed price for 2024 audit			<u>\$ 14,000</u>

SCHEDULE OF PROFESSIONAL FEES AND EXPENSES			
FOR THE AUDIT OF THE 2025 FINANCIAL STATEMENTS			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Total</u>
Partners	40	\$290	\$ 11,600
Managers	50	190	9,500
Staff Professionals	35	160	5,600
Total for Services Described in RFP	<u>125</u>		<u>26,700</u>
Mauldin & Jenkins discount from standard fees and expenses			<u>(12,700)</u>
Total all inclusive not to exceed price for 2025 audit			<u>\$ 14,000</u>

SCHEDULE OF PROFESSIONAL FEES AND EXPENSES			
FOR THE AUDIT OF THE 2026 FINANCIAL STATEMENTS			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Total</u>
Partners	40	\$295	\$ 11,800
Managers	50	195	9,750
Staff Professionals	35	165	5,775
Total for Services Described in RFP	<u>125</u>		<u>27,325</u>
Mauldin & Jenkins discount from standard fees and expenses			<u>(12,825)</u>
Total all inclusive not to exceed price for 2026 audit			<u>\$ 14,500</u>

SCHEDULE OF PROFESSIONAL FEES AND EXPENSES			
FOR THE AUDIT OF THE 2027 FINANCIAL STATEMENTS			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Total</u>
Partners	40	\$300	\$ 12,000
Managers	50	200	10,000
Staff Professionals	35	170	5,950
Total for Services Described in RFP	<u>125</u>		<u>27,950</u>
Mauldin & Jenkins discount from standard fees and expenses			<u>(12,950)</u>
Total all inclusive not to exceed price for 2027 audit			<u>\$ 15,000</u>

Transmittal Letter

May 10, 2023

Audit Selection Committee
Attn: Sharon Denson, Chair
Bayshore Gardens Park & Recreation District
1903 69th Avenue West
Bradenton, Florida 34207

Ladies and Gentlemen:

We appreciate the opportunity to propose on continuing to provide audit services to the Bayshore Gardens Park and Recreation District (the "District"). We are pleased to submit a qualifications package including cost estimates to provide annual financial and compliance auditing services for the fiscal years ending September 30, 2023 through 2027, by mutual agreement and funding availability.

We have read the Request for Proposal (RFP) and fully understand its intent and contents. We understand the time frame for performance of the annual financial audits as stipulated by the District, and agree to provide the services described in the proposal. We will conduct preliminary and final fieldwork and will issue all of the deliverables and reports substantially prior to the required due dates.

Mauldin & Jenkins is committed to client service. We are committed to building relationships with our clients, obtaining a thorough understanding of our client's organization and needs, working with clients as trusted advisors, and delivering a high-quality final product on time. There are many factors necessary to achieve quality client service. The following are some features we would like to highlight which differentiate us from other firms:

- **Governmental Experience:** Our Firm has made the governmental sector a primary industry focus. We have served the audit and compliance needs of numerous governmental entities over the years and remain committed to serving this sector. We provide the following statistics related to our governmental practice:
 - Over 700 governmental entities served in the Southeast on an annual basis which includes over 200 special districts.
 - 150+ full-time equivalent professionals with current governmental accounting experience.
 - We serve over 150 entities who receive the GFOA Certificate of Achievement for Excellence in Financial Reporting on an annual basis.
 - We serve as the plan auditor for approximately 30 single employer defined benefit pension plans in Florida, and currently audit in excess of \$2.5 billion in Florida pension assets.
 - We serve over 290 entities requiring federal/state Single Audits annually.
 - We are an authorized service provider by the State of Florida Master Services Agreement.
- **Experienced Personnel:** The personnel included in this proposal for your engagement have numerous years of professional experience in the governmental sector and are dedicated to serving this industry. We make every effort to retain experienced and qualified staff which will assist in providing staff continuity. The quality of the proposed engagement team is the clearest evidence of our commitment to serve you.

- **Responsiveness and Large Firm Resources with Small Firm Sensitivity:** We pride ourselves in responding to the needs of our clients; not only the ability to meet deadlines, but also to respond to other requests. Our ability to be responsive is enhanced by the open communications and good working relationship we have with our clients. Our resources provide for the flexibility to meet your needs and to perform our services in an efficient and effective manner.
- **Information Technology Services:** We are proud to be one of the few firms in the Southeast to utilize Artificial Intelligence tools as part of our audit process. We also use a web-based file transfer software called Suralink. These tools provide for a more effective and efficient audit. We also have resources to address the evolving cybersecurity threats to your government by having Certified Information Systems Auditors ("CISA") on staff and who are certified by the American Institute of CPAs ("AICPA") to provide cybersecurity advisory services and the newly created cybersecurity assessment.
- **Education:** Presently, Mauldin & Jenkins clients have the opportunity to register and receive a minimum of sixteen hours of complimentary continuing education on an annual basis. We take our experience in serving governments, and choose timely and relevant topics to provide ongoing education to our clients. We believe education and training to be a key element of serving our governmental clientele. These classes are taught by Mauldin & Jenkins professionals, who also spend time each year teaching at various National and State Governmental Conferences.
- **Nationally Recognized:** Mauldin & Jenkins is consistently ranked in the Top 100 by various publications as one of the largest certified public accounting firms in the country. We are a regional firm, but the Firm's influence is shared nationally. Our partners have volunteered to serve: as the American Institute of CPAs (AICPA's) sole representative to Government Accounting Standards Advisory Council (GASAC); the 2015 Chairman of the Board of the AICPA; and a board member of the International Federation of Accountants (IFAC) in 2016. In January 2020, our own Joel Black accepted the opportunity to serve as the Chairman of the Governmental Accounting Standards Board (GASB). Mauldin & Jenkins is a leader nationally.
- **Fees:** We propose a first-year fee of \$13,500 for the audit of the District's fiscal year 2023 financial statements with an approximate 2% increase annually over the term of the contract, subject to the agreement each year by the governing board. Our quoted fees will not change so long as there are no changes in the scope of the District's engagement.

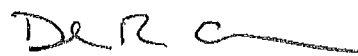
We realize the difficulty in selecting an audit firm, however by selecting Mauldin & Jenkins, you will be provided excellent client service and operational best practices stemming from our service to hundreds of governmental entities. We understand the work requested and are committed to meeting your deadlines. This proposal represents a firm offer for 90 days.

Thank you very much for considering our Firm and allowing us to present our proposal. As a partner of Mauldin & Jenkins, Daniel Anderson is authorized to bind and make representations for the Firm. He will be the ultimate party responsible for the quality of the report and working papers.



Wade P. Sansbury, CPA
Partner
Direct: 941-741-2255
wsansbury@mjcpa.com

Sincerely,
MAULDIN & JENKINS, LLC



Daniel R. Anderson, CPA
Partner
Direct: 941-741-2213
danderson@mjcpa.com

Mauldin & Jenkins, LLC Qualifications and Experience


Independence

We hereby affirm that Mauldin & Jenkins, LLC is independent with respect to the Bayshore Gardens Park & Recreation District. We meet the independence standards of Generally Accepted Auditing Standards and the U.S. Government Accountability Office's *Government Auditing Standards*. We are also independent with respect to the District within the meaning of Rule 101 of the Code of Professional Ethics of the American Institute of Certified Public Accountants and the applicable published rules and Interpretation thereunder.

We will conduct our audits objectively and will report findings, opinions and conclusions objectively. As noted above, we are free from personal and external impairments to independence, are organizationally independent and will maintain an independent attitude and appears so that opinions, conclusions, judgements, and recommendations are impartial and will be viewed as impartial by knowledgeable parties. There are no situations that might lead others to question our independence. Additionally, we will give the District written notice of any professional relationships entered into during the period of this agreement.

License to Practice in Florida

Mauldin & Jenkins is licensed to practice public accounting within the State of Florida. Our Firm's Florida license number is AD0007585. Additionally, all assigned key professional staff are properly licensed and registered to practice public accounting within the State of Florida. We have included a copy of the Firm's state licensure below which we have had since the mid-1980s. All other individual licenses are available upon request and can be independently verified at www.myfloridalicense.com.

Ron DeSantis, Governor	Julie J. Brown, Secretary
STATE OF FLORIDA DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION BOARD OF ACCOUNTANCY	
LICENSE NUMBER: AD0007585	EXPIRATION DATE: DECEMBER 31, 2023
THE ACCOUNTANCY CORPORATION HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 473, FLORIDA STATUTES	
MAULDIN & JENKINS, CERTIFIED PUBLIC ACCOUNTANTS, LLC MAULDIN & JENKINS 200 GALLERIA PKWY SE SUITE 1700 ATLANTA GA 30339	
ISSUED: 12/15/2021	
Always verify licenses online at MyFloridaLicense.com Do not alter this document in any form. This is your license. It is unlawful for anyone other than the licensee to use this document.	

Similar Engagements with Other Governmental Entities

References

As stated previously, Mauldin & Jenkins audits approximately 700 governmental entities throughout the Southeast. In addressing the District's interest in the qualifications and client references of Mauldin & Jenkins and the request for audits performed that are similar to that of the District, we have elected to report on the following current Mauldin & Jenkins clients, all of which are special purpose entities like the District. Should management of the District need additional references, we would be happy to provide such data.

1) Trailer Estates Park and Recreation District

General Information	Park and Recreation District located in Bradenton, Florida. The District reports \$1.6 million in assets and annual revenues of \$1.8 million.
Scope & Type of Engagement	Financial audits and compliance audits in accordance with Governmental Accounting Standards. Preparation of financial statements.
Dates	September 30, 2008 through present
M&J Personnel	Daniel Anderson and Wade Sansbury
Contact Information	Ms. Mary Chandler - (941) 756-7177 - treasurer@trailerestates.com

2) Hendry County Recreation Board

General Information	Special purpose government located in LaBelle, Florida. Board reports \$2.9 million in total assets and annual revenues of \$1.1 million.
Scope & Type of Engagement	Financial audits and compliance audits in accordance with Governmental Accounting Standards. Preparation of financial statements.
Dates	September 30, 2021 through present
M&J Personnel	Daniel Anderson
Contact Information	Ms. Lilly Hart, Office Manager - (863) 675-5347 - lilly.hart@hendryfla.com

3) Captiva Erosion Prevention District

General Information	Erosion Protection District located in Lee County. District reports \$20 million in total assets and annual revenues of \$1 million.
Scope & Type of Engagement	Financial audits and compliance audits in accordance with Governmental Accounting Standards and the Uniform Guidance.
Dates	September 30, 2015 through present
M&J Personnel	Wade Sansbury and Garrett Marlowe
Contact Information	Mr. Daniel Munt, Executive Director - (239) 472-2472 - dmunt@mycepd.com

4) Ocean Highway Port Authority

General Information	Port Authority located in Northeast Florida. Authority reports \$15 million in total assets and annual revenues of \$1.9 million.
Scope & Type of Engagement	Financial audits and compliance audits in accordance with Governmental Accounting Standards. Preparation of financial statements.
Dates	September 30, 2013 through present
M&J Personnel	Wade Sansbury and Garrett Marlowe
Contact Information	Mr. Pierre LaPorte - (904) 261-7803 - pierre@coursonstam.com

Seasoned Governmental Advisory Expert Joins Mauldin & Jenkins

1 message

Mauldin & Jenkins <mjgovt@mjcpa.com>

Tue, May 16, 2023 at 7:16 AM

Reply-To: mjgovt@mjcpa.com

To: office@bayshoregardens.org



We would like to thank you for being a valued client and share some exciting news with you. As of May 8, we are proud to announce the hiring of Director David Jahosky, a seasoned professional with extensive experience providing governmental advisory services. With this strategic addition to Mauldin & Jenkins, the firm's Governmental Advisory practice is even better positioned to provide superior advisory services to both state and local governmental entities.

David brings a wealth of knowledge to the firm's Governmental Advisory practice and has served public sector entities for almost 30 years. He has an unparalleled understanding of governmental operations as well as the budgetary and strategic planning impacts on state and local governments in Florida and throughout the Southeast.

David is proficient in the areas of Management and Financial Consulting, Governmental Budgeting and Accounting, Best Practices in State and Local Government Operations, Internal Audit, and Data Analytics.

In David's role, he will primarily focus on providing Compliance, Strategy, Transformation, Operational Efficiency and Effectiveness, and Performance

Management services to governmental clients.

Please join us in welcoming David to the Mauldin & Jenkins family! Please don't hesitate to reach out if we can be of assistance now or in the future. To learn more about David Jahosky, please visit our website.



Mauldin & Jenkins, 200 Galleria Pkwy, Suite 1700, Atlanta, Georgia 30339, United States,
800.277.0080

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May 24, 2023

Re: Open Board of Trustee seat

Board of Trustees

I have been working on the Auditor Selection Committee as well as the Budget and Finance Committee and have discovered some serious issues that need to be addressed. I am qualified to assist Terry with these issues. The issues are not vote-able issues. I will work with and support our Treasurer within the guidelines of the Sunshine Laws.

In the past as a Trustee, I have saved the District over \$50K dollars and in the process of more savings with next five years audits.

1. Re-negotiated the contract for the Engineers for the Boat Ramp and saved the District over \$20K.
2. Re instituted the Auditor Selection Committee and saved the District over \$20K over five years in audits
3. Acted as Para Legal for our attorney in settling legal action. Savings to District over \$10K
4. Researching and addressing \$14K in bank charges for this year.

The May Work Session only had three Trustees in attendance. We cannot operate the district under these conditions. Circumstances change and that is understood, but the business has to go on and the Work Session is where we have the opportunity to discuss projects and issues in the Sunshine, get residents input, and research to prepare for a vote at the Board meeting.

I am ready and able to accept the open seat vacated by Melanie Woodruff that has been vacant for months. I am more than qualified to assume the responsibilities vacated by Trustee Woodruff. I request an up or down vote tonight as has been done in the past, most recently was the seating of Trustee Baxter.

Respectfully submitted,



Sharon Denson

941-752-7421

June 28, 2023

Sharon Denson

Addendum to my letter to fill BOT open seat.

I am hearing from some of you that I am more valuable doing what I do now rather than serving as a Trustee. I wish to dispel that now. The Sunshine Laws do not preclude anyone from asking anyone to gather facts for the Board to use. The **request** is not a vote-able issue, thus not a Sunshine Violation. Any response to the request would have to be presented in a public meeting with no prior discussion or ranking of the facts presented. I would continue to offer the services that I have been doing plus assume any and all duties of the Office of Trustee. Having attended most of the District meeting since moving to Bayshore Gardens as well as serving on numerous committees, I am totally up to speed to assume whatever duties I will be assigned. Presently I lack the standing to pursue some of the critical work that remains to be done. I believe I have demonstrated my commitment to the community and I am giving my commitment to attend meetings and serve when requested to do so.

Serving the community as a Trustee is a very serious position to occupy and requires Experience, Expertise, and Enthusiasm. I believe I have all three qualities and will use this opportunity to bring those qualifications forward in a short presentation.

EXPERTISE EXPERIENCE ENTHUSIASM

As a past Trustee I Corrected the Bylaws to adhere to State Law. Our attorney had advised this board on numerous occasions in writing that the Bylaws needed to be corrected. I rewrote the Bylaws and the Bylaws were approved by our Attorney and the Board. (Charter, page 5, (g)(7)).

Having read the Statues pertaining to Budgeting I stopped an illegal act in a Budget Hearing. (The Chairman tried to remove Marina amenity from the Budget). My reading of the Statute was supported by the Districts Attorney present at that meeting. (FS 189.016)

Being able to read and understand QuickBooks P&L as well as Balance Sheets and FS 218.33 requirements for Special Districts/Political Subdivisions to maintain and follow Uniform Accounting Practices and Procedures which includes internal controls as well as ensures reliability of financial records and reports. Having a report that is easy to understand is critical to holding a position of Trustee. I have been working behind the scenes to correct the problems with our compliance with this statute.

Our Auditor Selection Committee is Familiar with Uniform Accounting Act as required by FS218.33. pg 3 third paragraph, which states "...this does not preclude local entities from maintaining more detailed records for their own use." I have been insisting that our Reserves and balances forward be a part of the P&L to be in compliance with FS 189.016, currently we are not.

I have saved the District almost enough money to pay for the Basketball and Pickle ball courts.

- a) Boat Ramp contract with engineering firm, saved over \$20,000.00 by appointing an employee to oversee the project and work with engineers by phone.
- b) The District had failed to appoint an Auditor Selection Committee as required by Law. I started and served on the committee and the committee by producing an RFP and advertising saved the District \$25,000.00 over five years.
- c) By following the law and assuming the responsibility, our committee tonight stands to save the District over \$40,000.00 in auditing fees even though that was not our reason to change auditors, our doing our statutory duty causes the savings.

- d) Handled an employee dismissal that was very delicate, assembled the documentation the attorney needed, thus saving a paralegal coming to the district and going thru the records. I also realized that the records were not being maintained in the District Office as required by Law and corrected the record keeping procedures. (Records were brought in from Trustees and past Trustees homes) In addition that employee was seeking monetary compensation. Total cost would have exceeded \$10,000.00

Started the Policy and Procedure Committee and served as its chair to put the votes taken by the board over the years into a usable form as required by our Charter, page 7, Sec 3) We must treat all residents uniformly and to generally benefit from the District. Written policies and procedures guarantees this. The Attorney supports the compilation of our rules and procedures.

My review of all written records of the District, including minutes of the Board of Trustees as retained. Much found in the minutes that was the basis for policies written. Board decisions contained in the meeting minutes were converted into a usable form.

As a Trustee, in compliance with FS 655 (Record Retention), sorted records and destroyed pursuant to Florida Law. This required task had not been done in years pursuant to law. It has not been done again in over 5 years but is required by law. I have proven my capabilities for this statutory required task.

I negotiated with the County and our District has been given a water and sewer hookup for a bathroom in the Marina area at no charge to the District. We had planned to have another bathroom that had to be pumped. This negotiation will result in savings of many dollars over the years in charges to dump the previously proposed facility. In addition we will gain in terms of maintenance on the facility.

I have written numerous RFP's for the District, enabling projects to move forward.

I am proficient at writing specifications for projects that we will need to obtain bids

I contacted and obtained bids for Architectural work for Marina/Breezeway Bathrooms

I researched and obtained requirements to be ADA compliant for Marina, Hall, and pool.

I am familiar with Florida Law as it affects our District. Any laws/statutes that I am not familiar with, I find easily and provide to the Board. I am able to obtain legal opinions without cost to the District. I am called upon often by Trustees in meeting for answers to procedural questions and factual information.

We have a lot of work ahead of us and need a Trustee that can go to work immediately. If someone else has applied that is more qualified to hit the ground running, they should be seated. If they are not ready to immediately assume responsibilities and go forward, I feel I can do more for the community.

I will be happy to address any of your questions or concerns.

Respectfully submitted,

Sharon Denson

Cori Howell
1106 Harvard Ave
Bradenton, FL 34207
cori3h@yahoo.com
(941) 447-6377

Board of Trustee Position

Profile

I am a long time resident of Bayshore Gardens and have, at times, participated in attempts to better our community, I am an avid boater and utilize the common grounds of our community frequently. I am resourceful and experienced with business organization, project management, building, permitting, legal issues, contracts, general management, boats and marinas, customer relations and other areas that I feel would be an asset to our Board of Trustees.

Experience

2000 - Present - Owner and operator salon
Cori Howell LLC / DBA The Salon by Cori, Bradenton FL
Client services, scheduling, time management, ordering, finances, sublet space management, leasing, customer relations, repairs and maintenance.

2020 - Present - Realtor
All Brokers Real Estate, Bradenton FL
Leasing, listings, sales and all associated contracts.

2001- 2011 - Owner
Elite Aluminum Etc. Inc, Bradenton / Sarasota FL
Structural aluminum and concrete construction business
Operations regarding permitting, engineering, legals, contracts and contract writing, finances, employees, payroll, customer relations, advertising, licensing.

2011- 2019 - Owner - OUPV (captains license)
Left Coast Fishing Charters LLC, Bradenton, FL
Event presentations and appearances, tournament organizations, hosting, sponsors, tournament participation, boat operations and on and off water training.
This work at times was contracted through Brunswick/ Cabo/ Hatteras Yachts.

1996 -1998 / 2000-2002 - General Manager
Long Term Care Consultants, Sarasota, FL
Psychiatric firm
Patient treatment plans and insurance reports, legal matters, licensing, employees, office operations, patient forms and charting.

Cori Howell
1106 Harvard Ave
Bradenton, FL 34207

(941) 447-6377
cori3h@yahoo.com

Letter of intent for Board of Trustee position

I am writing to express my interest for the vacant Board Member position at Bayshore Gardens Park and Recreation District. I have been a resident of Bayshore Gardens for over 20 years and at times have owned multiple homes in the community. I actively use of the common grounds within our community, most notably the marina and park area therefore I have a vested interest in helping maintain the unique amenities our community has to offer as our surrounding areas continue to develop.

My I have owned multiple businesses including customer based businesses and a construction business. I have experience and resources within those businesses and other positions handling the finances, permitting, human resources, legal dealings, contracting and customer relations. My organization and project management skills were utilized continuously in all businesses and work places as well as my ability to restructure workplaces and streamline projects and deadlines.

Thank you for your consideration. I look forward to hearing from you.

Cori Howell