

Agenda
Bayshore Gardens Park & Recreation District
Board of Trustee Work Session
Wednesday; July 12, 2023, @ 7:00 P.M.

1. Roll Call
2. Call to Order
3. Pledge to Flag
4. Trustee Committee Reports
 - Marina (Morris) - FOB to Exit North Marina
 - Marina (Morris) - Ramp Sign
 - Marina (Morris) - Additional Items Discussed (If Any)
 - Long Range Planning (Dan) - Discussion on 3 to 5 Year Plan
 - Long Range Planning (Dan) - Additional Items as Needed
5. Auditor Selection
6. Additional Items as Needed

(Resident comments agenda item 3 minutes)
7. 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 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 Receptions 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 5-15-98
Revised [Signature]
Effective 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.

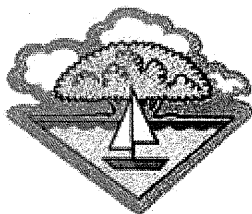
Eleven RFPs were sent out, but we only received two proposals. The committee interviewed the two companies and made a selection which Mrs. Denson presented to the Board last night. Mrs. Denson made it clear the committee made a decision and the Board was advised by her, no vote was necessary.

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,

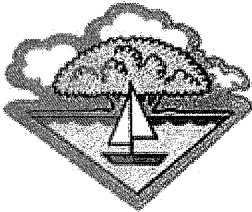
I have attached the Auditor Selection Policy in this email. Mrs. Denson stated at the Board meeting, by law the auditor selection committee selects the auditors?

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

Hi Gia,

I reviewed the policy, as well as, Section 218.391, Florida Statutes, which governs audit selection committees. Section 218.391(3)(e) provides that the audit selection committee recommends to the governing body rank and recommend in order of preference no fewer than three firms deemed to be the most highly qualified to perform the required service, but, in situations where there are fewer than three responses to the proposal, the committee shall recommend such firms as it deems to be the most highly qualified. Section 218.391(4) provides that the governing body shall inquire of qualified firms as to the basis of compensation, *select one of the firms recommended by the auditor selection committee*, and negotiate a contract. As such, the auditor selection committee serves as a recommending committee and the Board ultimately selects the auditor from the recommended list provided by the committee.

[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 10:47 AM

Marisa,

Thank you so much for your help and getting back to me so quickly. I will pass this information on to the Board. If they have any further questions I will let you know.

Have a great weekend!

Thank you,

Gia Cruz

District Office Manager



Bayshore Gardens Park & Recreation District

6919 26th Street W.

Bradenton, FL 34207

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[Quoted text hidden]

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

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

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:

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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: _____

Dollar Cost Proposal¹⁴

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**

	Hours	Hourly Rate	Total
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><u>\$ 14,000</u></u>

**SCHEDULE OF PROFESSIONAL FEES AND EXPENSES
FOR THE AUDIT OF THE 2026 FINANCIAL STATEMENTS**

	Hours	Hourly Rate	Total
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><u>\$ 14,500</u></u>

**SCHEDULE OF PROFESSIONAL FEES AND EXPENSES
FOR THE AUDIT OF THE 2027 FINANCIAL STATEMENTS**

	Hours	Hourly Rate	Total
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><u>\$ 15,000</u></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 CPA’s (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 I. 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

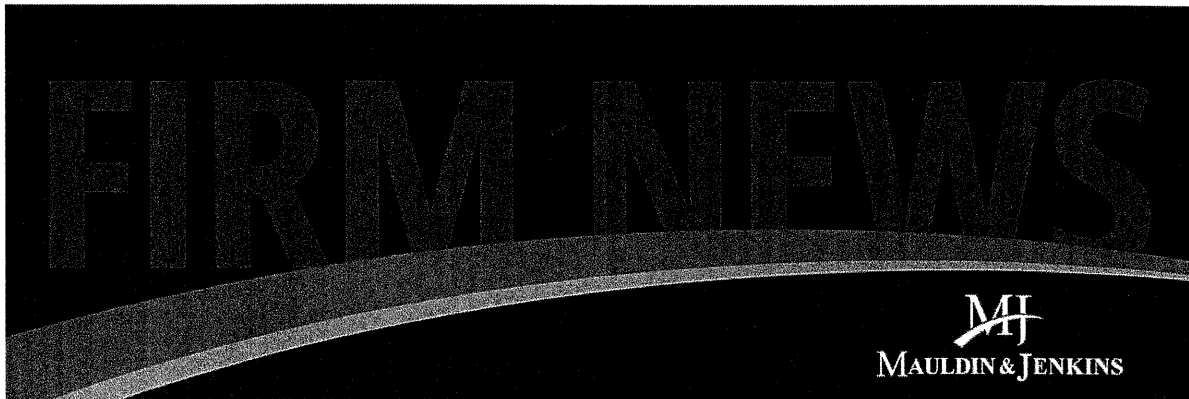
4) Ocean Highway Port Authority

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

Mauldin & Jenkins <mjgovt@mjcpa.com>
Reply-To: mjgovt@mjcpa.com
To: office@bayshoregardens.org

Tue, May 16, 2023 at 7:16 AM



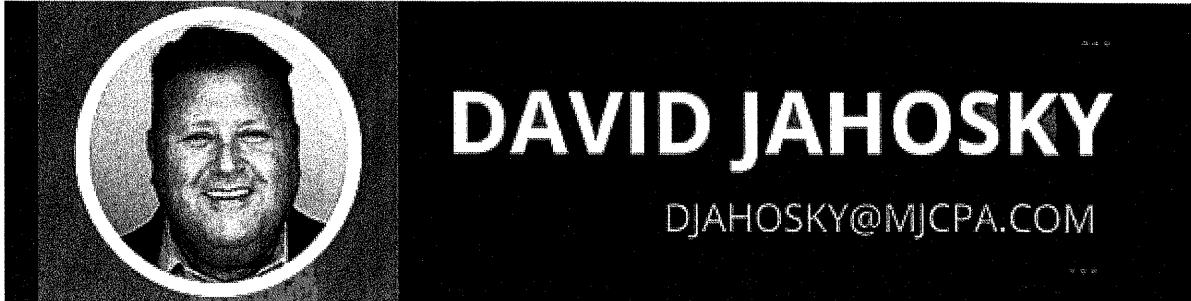
We would like to thank you for being a valued client and share some exciting news with you. As of May 8, we are proud to announce the hiring of Director David Jahosky, a seasoned professional with extensive experience providing governmental advisory services. With this strategic addition to Mauldin & 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

[Unsubscribe](#) [Manage preferences](#)



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.

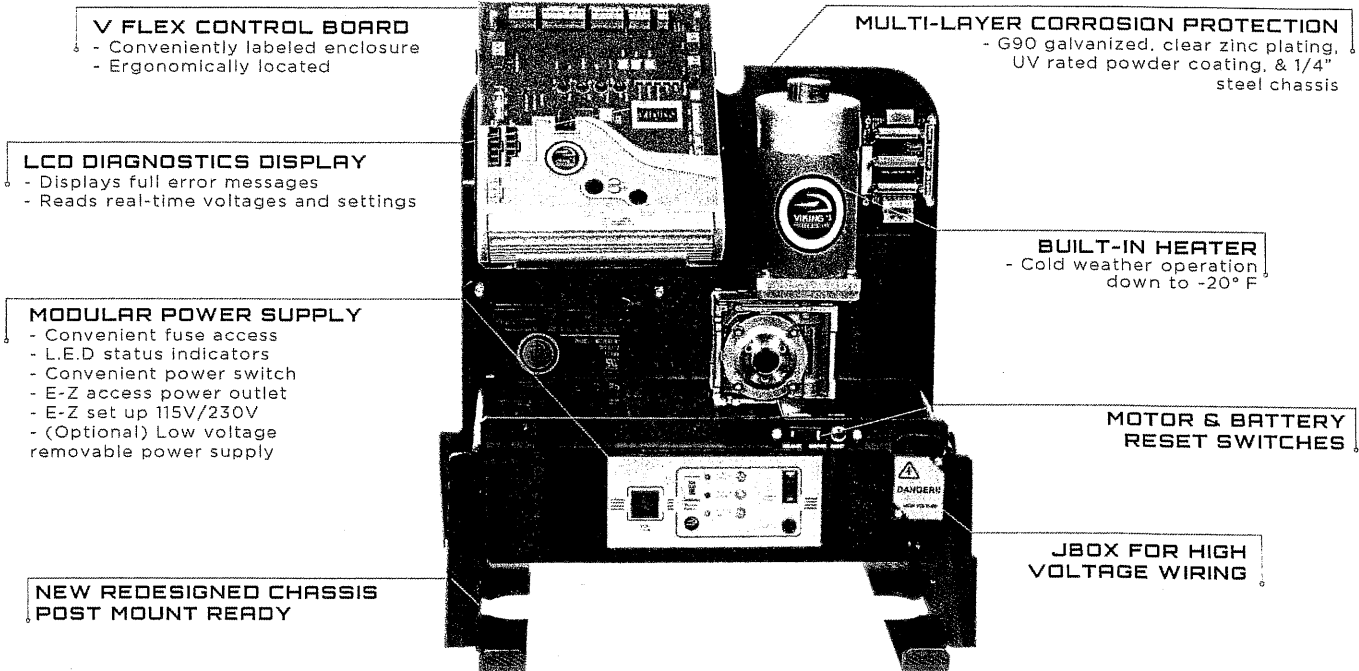
Thank you for your business, have a great day!



L-3 SLIDE GATE OPERATOR



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



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

Fence Installation Quote

1 message

Sarasota Fence <sarasota.fence@gmail.com>
To: "office@bayshoregardens.org" <office@bayshoregardens.org>

Wed, Jun 21, 2023 at 4:59 PM

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.

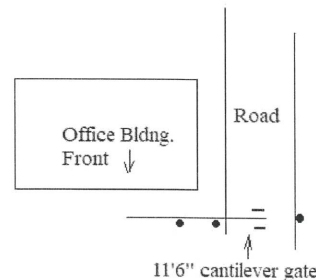
Same as above specified using aluminum gate & posts **\$8,955.00**

Gate operator set to open automatically down 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

Gate Post Length: 8' 10' _____ 12' _____ other _____

Gate Post Size: 2.1/2" _____ 2" _____ 1.5/8" _____ other 4" Concreted

Existing: take down _____ ? _____ haul away _____

Permit: yes _____ no (DEED RESTRICTIONS) _____

Survey Provided: yes _____ no _____ not required

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



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 DISTRICT

Mail Address 6919 26th ST W
BRADENTON 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 on Black Vinyl
CHAIN LINK

2- 4" SHT 40 GATE POST
 INSTALL 31' OF 4' TALL ALL
 BLACK VINYL CHAIN LINK
 FENCE

MECHANIC		HOURS	DATE COMPLETED
CL	WD	VYL	ORN
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
	Cement all POST		
	TOTAL \$ 5972.98		
	* GATE OPERATOR INSTALL <u>\$ 5531.80</u>		

CANDY _____ FPL

I hereby acknowledge the satisfactory completion of the above described work

CUSTOMER _____ DATE _____

