



**TRADITION
COMMUNITY DEVELOPMENT
DISTRICT NOS. 1 - 11**

PORT ST. LUCIE

**REGULAR BOARD MEETING
AUGUST 6, 2025
11:00A.M.**

Special District Services, Inc.
The Oaks Center
2501A Burns Road
Palm Beach Gardens, FL 33410

www.traditioncdd1.org
www.traditioncdd2.org
www.traditioncdd3.org
www.traditioncdd4.org
www.traditioncdd5.org
www.traditioncdd6.org
www.traditioncdd7.org
www.traditioncdd8.org
www.traditioncdd9.org
www.traditioncdd10.org
www.traditioncdd11.org

561.630.4922 Telephone
877.SDS.4922 Toll Free
561.630.4923 Facsimil

AGENDA
TRADITION COMMUNITY DEVELOPMENT DISTRICT NO.'S 1-11
Tradition Town Hall
10799 SW Civic Lane
Port St. Lucie, FL 34987
OR
Join Zoom Meeting:
<https://us02web.zoom.us/j/3341025012?omn=83871110572>
Meeting ID: 334 102 5012
Dial-In: 1 929 436 2866
REGULAR BOARD MEETING
August 6, 2025
11:00 a.m.

- A. Call to Order
- B. Proof of Publication.....Page 1
- C. Establish Quorum
- D. Additions or Deletions
- E. Comments from the Public Not on the Agenda
- F. Consent Items
 - 1. Approval of June 4, 2025, Regular Board Meeting Minutes.....Page 2
 - 2. Approval of June 26, 2025, Special Board Meeting Minutes - District Nos. 1,7,8,9,10&11...Page 8
 - 3. Approve and Ratify Services Contract with Ryper Water Analytics.....Page 10
 - 4. Approve and Ratify WA #19-143-193; 12483 SW Sunrise Lake Terrace Pool.....Page 26
- G. Old Business
 - 1. Irrigation Franchise Agreement
- H. New Business
 - 1. Consider Resolution No. 2025-16; Adopting Fiscal Year 2025/2026 Annual Meeting Schedule.....Page 30
 - 2. Discussion: Bonds vs O&M Assessments to Pay for Lake Restoration Costs
 - 3. Discussion and Consideration of District Legal Counsel.....Page 34
- I. Administrative Matters
 - 1. Manager's Report
 - 2. Attorney's Report
 - 3. Engineer's Report
 - 4. Financial Report.....Page 55
 - 5. Founder's Report
- J. Board Member Discussion Requests and Comments
- K. Adjourn

**Notice of Public Hearing
and Regular Board Meeting of the
Tradition Community Development District Nos. 1-11**

The Board of Supervisors (the "Board") of the Tradition Community Development District Nos. 1-11 will hold a Public Hearing and Regular Board Meeting on August 6, 2025, at 11:00 a.m., or as soon thereafter as can be heard, at Tradition Town Hall located at 10799 SW Civic Lane, Port St. Lucie, Florida 34987.

The purpose of the Public Hearing is to receive public comment on the Fiscal Year 2025/2025 Proposed Final Budgets of the Tradition Community Development District Nos. 1-11. The purpose of the Regular Board Meeting is for the Board to consider any other business which may properly come before it. A copy of the Budgets and/or the Agenda may be obtained from the Districts' websites or at the offices of the District Manager, Special District Services, Inc., 10807 SW Tradition Square, Port St. Lucie, Florida 34987 during normal business hours. The meetings are open to the public and will be conducted in accordance with the provisions of Florida law. Meetings may be continued as found necessary to a time and place specified on the record.

There may be occasions when one or more Supervisors will participate by telephone; therefore, a speaker telephone may be present at the meeting location so that Supervisors may be fully informed of the discussions taking place.

In accordance with the provisions of the Americans with Disabilities Act, any person requiring special accommodations or an interpreter to participate at these meetings should contact the District Manager at (772) 345-5119 and/or toll free at 1-877-737-4922, at least seven (7) days prior to the date of the meetings.

If any person decides to appeal any decision made with respect to any matter considered at this Public Hearing and Regular Board Meeting, such person will need a record of the proceedings and such person may need to ensure that a verbatim record of the proceedings is made at their own expense and which record includes the testimony and evidence on which the appeal is based.

Meetings may be cancelled from time to time without advertised notice.

Tradition Community Development District Nos. 1-11

www.traditioncdd1.org

www.traditioncdd2.org

www.traditioncdd3.org

www.traditioncdd4.org

www.traditioncdd5.org

www.traditioncdd6.org

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www.traditioncdd8.org

www.traditioncdd9.org

www.traditioncdd10.org

www.traditioncdd11.org

PUBLISH: St. Lucie News Tribune 07/17/25 & 07/24/25

TRADITION COMMUNITY DEVELOPMENT DISTRICT NOS. 1-11

**Tradition Town Hall
10799 SW Civic Lane
Port St. Lucie, Florida 34987**

OR

<https://us02web.zoom.us/j/3341025012?omn=86225592684>

Meeting ID: 334 102 5012

Dial-In: 1 929 436 2866

REGULAR BOARD MEETING

June 4, 2025

11:00 a.m.

A. CALL TO ORDER

The Regular Board Meeting of the Tradition Community Development District No.'s 1-11 of 8, 2025, June 4, 2025, was called to order at 11:00 a.m. in the Tradition Town Hall located at 10799 SW Civic Lane, Port St. Lucie, Florida 34987.

B. PROOF OF PUBLICATION

Proof of publication was presented that showed notice of the Regular Board Meeting had been published in the *St. Lucie News Tribune* on September 24th, 2024, as legally required.

C. ESTABLISH A QUORUM

It was determined that the attendance of the following Supervisors constituted a quorum, and it was in order to proceed with the meeting:

CDD #'s 1,2,7,8,9,10&11		
Chairman	Eric Sexauer	Present
Vice Chairman	William Pittsley	Present
Supervisor	Tara Toto	Present
Supervisor	Karl Albertson	Present
Supervisor	Jonas Read	Absent

CDD # 3		
Supervisor	Joe Piatcheck	Present
Chairman	Isaiah Steinberg	Present
Supervisor	Stan Briggs	Present
Vice Chair	Rosario "Roy" Perconte	Present
Supervisor	Suzanne Killeen	Present

CDD # 4		
Chairman	Gail Cost	Present
Vice Chairman	Rich Giglia	Present
Supervisor	Rob Siedlecki	Present (via Zoom)
Supervisor	Lauren Leandre	Present
Supervisor	Drew Wesley	Present

CDD # 5		
Supervisor	Cathy Powers	Present
Chairperson	Chris King	Present (via Zoom)
Supervisor	Dave Lasher	Present
Supervisor	Rick Dixon	Present (via Zoom)
Vice Chairman	Joe Pinto	Present

CDD # 6		
Chairman	Jerry Krbec	Present
Vice Chairman	Keith Bulkin	Present
Supervisor	George Russell	Absent
Supervisor	John Slicher	Present (via Zoom)
Supervisor	Peter Webb	Present

Staff members in attendance were:

District Manager	Frank Sakuma	Special District Services, Inc.
District Manager	Stephanie Brown	Special District Services, Inc.
Assistant District Manager	Jessica Wargo	Special District Services, Inc.
District Manager	Andrew Karmeris	Special District Services, Inc.
District Counsel	Ruth Holmes	Torcivia, Donlon, Goddeau & Rubin, P.A.
District Engineer	Stef Matthes	Culpepper and Terpening

Also present:
(See attached sign-in sheet)

D. ADDITIONS OR DELETIONS TO AGENDA

- (H-5) Mowing Services: Invitation to Bid - #TR-2025-01

A **motion** was made by CDD No. 1 Mr. Albertson, seconded by Mr. Pittsley, approving the agenda as amended. The **motion** passed unanimously.

E. COMMENTS FROM THE PUBLIC NOT ON THE AGENDA

There were no comments from the public.

F. CONSENT ITEMS

1. Approval of April 2, 2025, Regular Board Meeting Minutes
2. Approve and Ratify Amendment #1 to Statement of Work #TR20241031
3. Approve and Ratify Services Contract with Premier Site Work; Bridge Repairs
4. Approval of WA #19-143-190; Lotis at Tradition – SWM
5. Approval of WA #19-143-191; Westcliffe Lane Extension – SWM
6. Approval of WA #19-143-192; Sundance Vista Parkway – Phase 1 - SWM

A **motion** was made by CDD No. 1 Mr. Albertson, seconded by Mr. Pittsley, and passed unanimously by CDD No.1 approving all 1 through 6 under Consent Items.

G. OLD BUSINESS

1. Franchise Agreement

There were no updates at this time.

H. NEW BUSINESS

1. Report from the Lake Banks Committee

Dr. Powers introduced District Engineer, Stef Matthes, to provide the Lake Banks Report. Mr. Matthes stated that 42 lakes showed signs of lake bank erosion, and they were categorized from the most to least critical. He estimated that repairs would cost between \$7-8 Million over an extended period of time. Mr. Matthes advised that it was the recommendation of the Lake Banks Committee to establish a \$775,000 line item in the budget for lake bank maintenance.

2. Resolution 2025-11; Adopting Proposed Budget FY 25/26 and Setting a Public Hearing

Resolution No. 2025-11 was presented, entitled:

RESOLUTION NO. 2025-11

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE TRADITION COMMUNITY DEVELOPMENT DISTRICT NO.'S 1, 2, 3, 4, 5, 6, 7, 8, 9, 10 & 11 APPROVING THE DISTRICT'S PROPOSED BUDGET FOR FISCAL YEAR 2025/2026; SETTING A PUBLIC HEARING THEREON PURSUANT TO FLORIDA LAW; DIRECTING STAFF TO PROVIDE A COPY OF THE PROPOSED BUDGET TO THE LOCAL GENERAL PURPOSE GOVERNMENT AND PROVIDING FOR NOTICE OF SAID HEARING PURSUANT TO LAW.

A **motion** was made by CDD Nos. 1,2,7,8,9,10 &11, Mr. Sexauer, seconded by Mr. Albertson, adopting Resolution No. 2025-11, amended to reflect the addition of a \$775,000 line item to the Lake Bank Maintenance section of the budget, increasing assessments by \$100 and setting the Public Hearing date from September 9, 2025. The **motion** passed unanimously.

A **motion** was made by CDD No. 3, Mr. Piatcheck, seconded by Mr. Steinberg, adopting Resolution No. 2025-11, amended to reflect the addition of a \$775,000 line item to the Lake Bank Maintenance section of the budget, increasing assessments by \$100 and setting a Public Hearing date of September 9, 2025. The **motion** passed unanimously.

A **motion** was made by CDD No. 4, Ms. Cost, seconded by Mr. Giglia, adopting Resolution No. 2025-11, amended to reflect the addition of a \$775,000 line item to the Lake Bank Maintenance section of the budget, increasing assessments by \$100 and setting a Public Hearing date of September 9, 2025. The **motion** passed on a vote of 3 to 2 with Messrs. Siedlecki and Wesley dissenting.

A **motion** was made by CDD No. 5, Mr. Pinto, seconded by Ms. Powers, adopting Resolution No. 2025-11, amended to reflect the addition of a \$775,000 line item to the Lake Bank Maintenance section of the budget, increasing assessments by \$100 and setting a Public Hearing date of September 9, 2025. The **motion** passed unanimously.

A **motion** was made by CDD No. 6, Mr. Krbec, seconded by Mr. Webb, adopting Resolution No. 2025-11, amended to reflect the addition of a \$775,000 line item to the Lake Bank Maintenance section of the budget, increasing assessments by \$100 and setting a Public Hearing date of September 9, 2025. The **motion** passed unanimously.

3. Resolution 2025-13; Authorizing Certain Actions in Connection with the Implementation of the District's Capital Improvement Plan -District Nos. 1-11

Resolution No. 2025-13 was presented, entitled:

RESOLUTION NO. 2025-13

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE TRADITION COMMUNITY DEVELOPMENT DISTRICT NO. 1 AUTHORIZING CERTAIN ACTIONS IN CONNECTION WITH THE IMPLEMENTATION OF THE DISTRICT'S CAPITAL IMPROVEMENT PLAN, INCLUDING THE CONVEYANCE AND/OR ACQUISITION OF REAL AND PERSONAL PROPERTY, EXECUTION OF PLATS, TRANSFER OF PERMITS, EXECUTION OF CONTRACTS AND CHANGE ORDERS, PAYMENT OF REQUISITIONS, AND OTHER ACTIONS AS DESCRIBED HEREIN; APPROVING THE SCOPE AND TERMS OF SUCH AUTHORIZATION; PROVIDING A SEVERABILITY CLAUSE; AND PROVIDING AN EFFECTIVE DATE.

A **motion** was made by CDD Nos. 1,2,7,8,9,10&11, Mr. Albertson, seconded by Mr. Pittsley, adopting Resolution No. 2025-13 as presented. The **motion** passed unanimously.

A **motion** was made by CDD No. 3, Mr. Steinberg, seconded by Mr. Perconte, adopting Resolution No. 2025-13 as presented. The **motion** passed unanimously.

A **motion** was made by CDD No. 4, Ms. Cost, seconded by Ms. Leandre, adopting Resolution No. 2025-13 as presented. The **motion** passed unanimously.

A **motion** was made by CDD No. 5, Dr. Powers, seconded by Mr. Lasher, adopting Resolution No. 2025-13 as presented. The **motion** passed unanimously.

A **motion** was made by CDD No. 6, Mr. Webb, seconded by Mr. Krbec, adopting Resolution No. 2025-13 as presented. The **motion** passed unanimously.

4. Approving Tradition Trail Easement and Berm Agreement with the Lakes at Tradition HOA

A **motion** was made by CDD No. 1 Mr. Sexauer, seconded by Mr. Pittsley, approving the Tradition Trail Easement and Berm Agreement with the Lakes at Tradition HOA as presented. The **motion** passed unanimously.

5. Authorizing Mowing Services: Invitation to Bid - #TR-2025-01

A **motion** was made by Mr. Albertson, seconded by Mr. Pittsley, authorizing execution of a 3-year contract with an option for two additional one-year renewals with A Quality Bushog Services Inc. for mowing services. The **motion** passed unanimously.

I. ADMINISTRATIVE MATTERS

1. Manager's Report

Mr. Sakuma reminded the Board to file their Form 1 by July 1, 2025, and to complete the annual ethics training no later than December 31, 2025. He also advised that an onsite ethics training session would be scheduled.

2. Attorney's Report

There was no Attorney's Report at this time.

3. Engineer's Report

There was no Engineer's Report at this time.

4. Financial Report

Mr. Sakuma advised that the financial report was provided in the Board package, and Mr. Karmeris was present to answer any questions.

5. Founder's Report

Mr. Sexauer advised that the grand opening of the Heart in the Park would be held on July 12, 2025; the Stars and Stripes Park will hold their grand opening later in the summer and the Regional Park is still in progress.

J. BOARD MEMBER COMMENTS

Dr. Powers asked for an update on enforcement options for prohibited boating and fishing in the stormwater lakes. Mr. Sakuma indicated that anyone could contact 911 to report a person as long as signage was posted.

Ms. Cost expressed her gratitude to Ms. Wargo regarding the irrigation billing.

Mr. Sexauer encouraged the Board Supervisors to attend Community Outreach Meetings.

Mr. Pinto asked for an update on replacing the delineators that were down. Mr. Sexauer responded that they were in the process of replacing them and the decision on whether to keep the delineators or remove them permanently was up to the City of Port St. Lucie.

Mr. Wesley asked if maps that demonstrate the ‘no fishing’ areas could be placed on the Master Association website. Mr. Sakuma stated that he would follow up with the Master Association.

K. ADJOURNMENT

There being no further business to come before the Board, Mr. Sexauer made a motion to adjourn the meeting at 11:38 a.m., seconded by Mr. Albertson. There were no objections.

Secretary/Assistant Secretary

Chair/Vice-Chair

Print Signature

Print Signature

TRADITION COMMUNITY DEVELOPMENT DISTRICT NOS. 1, 7, 8, 9, 10 & 11
Tradition Management Offices - Conference Room
10807 SW Tradition Square
Port St. Lucie, FL. 3987
SPECIAL BOARD MEETING
June 26, 2025
9:30 a.m.

A. CALL TO ORDER

The Special Board Meeting of the Tradition Community Development District Nos. 1, 7, 8, 9, 10 & 11 of June 26, 2025, was called to order at 9:32 a.m. in the Tradition Management Offices' conference room located at 10807 SW Tradition Square, Port St. Lucie, Florida 34987.

B. PROOF OF PUBLICATION

Proof of publication was presented that showed notice of the Special Board Meeting had been published in the *St. Lucie News Tribune* on June 18th, 2025, as legally required.

C. ESTABLISH A QUORUM

It was determined that the attendance of the following Supervisors constituted a quorum, and it was in order to proceed with the meeting:

CDD NOS. 1, 7, 8, 9, 10, 11		
Chairman	Eric Sexauer	Present
Vice Chairman	Bill Pittsley	Present
Supervisor	Tara Toto	Absent
Supervisor	Karl Albertson	Present
Supervisor	Jonas Read	Absent

Staff members in attendance were:

District Manager	B. Frank Sakuma, Jr.	Special District Services, Inc.
District Manager	Andrew Karmeris (via Zoom)	Special District Services, Inc.
Assistant District Manager	Jessica Wargo	Special District Services, Inc.
District Attorney	Amelia Jadoo	Torcivia, Donlon, Goddeau & Rubin, P.A.

Also present were: (See attached sign-in sheet)

D. ADDITIONS OR DELETIONS TO THE AGENDA

There were no additions or deletions to the agenda.

E. COMMENTS FROM THE PUBLIC

There were no comments from the public.

F. NEW BUSINESS

1. Resolution No. 2025-14; Adopting Proposed Budget FY: 25/26 and Setting a Public Hearing

Resolution No. 2025-14 was presented; entitled:

RESOLUTION 2025-14

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE TRADITION COMMUNITY DEVELOPMENT DISTRICT NOS. 1, 7, 8, 9, 10 & 11 APPROVING THE DISTRICT'S PROPOSED BUDGET FOR FISCAL YEAR 2025/2026; SETTING A PUBLIC HEARING THEREON PURSUANT TO FLORIDA LAW; DIRECTING STAFF TO PROVIDE A COPY OF THE PROPOSED BUDGET TO THE LOCAL GENERAL PURPOSE GOVERNMENT AND PROVIDING FOR NOTICE OF SAID HEARING PURSUANT TO LAW.

Estimates were provided to the Board for irrigation reuse costs that will be incurred during FY 2025-26 if the District and City expand the irrigation franchise into Tradition CDD Nos. 7-11. Based on the \$1,100,565 annual costs, the Board determined that amount should be added to a new expense line item in the budget and assessment rates should be set to cover the anticipated additional costs, plus all other O&M expenses.

A **motion** was made by CDD No. 1 Mr. Sexauer, seconded by Mr. Albertson adopting Resolution No. 2025-14, adopting the proposed budget and setting the Public Hearing for September 3, 2025. The **motion** passed unanimously.

G. BOARD MEMBERS DISCUSSION REQUESTS AND COMMENTS

There were no comments from the Board.

H. ADJOURNMENT

There being no further business to come before the Board, CDD No. 1 Mr. Sexauer made a **motion** adjourning the meeting at 10:15 a.m., Mr. Albertson seconded and the **motion** passed unanimously.

Secretary (B. Frank Sakuma. Jr.)

Chair/Vice-Chair

Printed Name

Printed Name

To: Board of Supervisors

From: Jesse Wargo, Assistant District Manager

Date: July 8, 2025

Board Meeting Date: August 6, 2025

SUBJECT

Approve and Ratify Services Contract with Ryper Water Analytics, LLC

STAFF RECOMMENDATION

Staff recommends Approving and Ratifying the financial planning and rate study consulting services for Tradition CDD's irrigation water utility system.

GENERAL INFORMATION

A five (5) year financial forecast of utility revenue requirements; A five (5) year capital funding analysis; and recommended rate adjustments for the upcoming fiscal year 2026 (the "Project").
Scope of work:

Task 1 – Kickoff and Data Acquisition/Compilation Review

Task 2 – Development of Customer Usage Forecast

Task 3 – Development of Revenue Projections from Existing Rates

Task 4 – Development of Operating Expense Projections

Task 5 – Capital Improvement and Funding Analysis

Task 6 – Other Revenue Requirement Identification and Management
Dashboard

Task 7 – Compliance Analysis

Task 8 – Development of Net Revenue Requirements and Rate Impact
Analyses and Staff Presentation

Task 9 – Rate and Fee Comparisons with Other Utilities

Task 10 – Report and Presentation of Project Results and Findings

Task 11 – Public Hearing

DISTRICT LEGAL COUNSEL REVIEW

Contract template provided by District Counsel.

FUNDING REVIEW

In an amount not to exceed \$30,500

Services Contract

This Contract entered into this 8th day of July, 2025, is between **RYPER WATER ANALYTICS LLC** (“Independent Contractor”), and **Tradition Community Development District No. 1** (“District”).

I. Duties of Independent Contractor: The Independent Contractor shall furnish all resources necessary to provide a Revenue Sufficiency Analysis, more fully described in attached Exhibit A, in the Tradition and Southern Grove Community Development Districts in Port St. Lucie, St. Lucie County, Florida.

II. Term; Entire Agreement: This Contract will be for a period of six months, commencing on the date entered into and ending on December 31, 2025, unless terminated in writing by either party in accordance with the termination provisions of Section V hereof. This Contract constitutes the entire agreement between the parties with respect to its subject matter and supersedes all prior oral or written agreements between the parties. Changes, including changes in price and cost, are ineffective unless properly authorized, signed, and delivered in writing by both parties as an addendum to this Contract.

III. Compensation: District agrees to pay Independent Contractor as compensation for the performance of the duties of the Independent Contractor under this Contract. The compensation shall be up to **\$30,500.00** in accordance with the terms described in Exhibit A. Invoices for services will be payable within the time limits and other requirements set forth in the Florida Local Government Prompt Payment Act, Part VII of chapter 218, Florida Statutes.

IV. Basic Understanding of the Parties: The parties acknowledge and agree that the District is a local government with a specialized single purpose of providing infrastructure. All of the work of the District is subject to public records, government-in-the-sunshine and related requirements. The parties understand that because the District is a local government certain requirements and limitations apply that would not apply to a private entity. The services provided by the Independent Contractor under this Contract are rendered to the District as an independent contractor and nothing in this Contract shall create an employer/employee, partnership, joint venture, or principal/agent relationship between the parties. Independent Contractor shall not be deemed to be an agent of the District within the meaning or scope of Florida Statute §768.28(9) and shall not be deemed exempt from responsibility or liability for claims or damages resulting from the Independent Contractor’s actions or failure to act under the terms and provisions of this Contract.

V. Termination: This Contract may be terminated with or without cause at any time by either party upon thirty (30) days prior written notice, delivered by first class U.S. mail or electronic mail transmission to the address of the other party as set forth in the signature blocks below, in which event all unaccrued rights, duties and obligations of the parties hereto shall terminate forthwith on the 30th day following receipt of the written notice.

VI. Other Related Provisions and Requirements:

- (a) Work Standard. Work shall be performed professionally in accordance with generally accepted standards of the trade or business.
- (b) Insurance. Independent Contractor shall provide certificate(s) of the following contractually required insurance coverages and policies to be maintained in full force and effect by the Independent Contractor in the coverage amounts set forth above, throughout the term of this Contract, and including any extensions thereof. All such policies and certificates shall also contain a waiver of subrogation in favor of the District and the District Manager and shall also name the District and the District Manager, including affiliates, officers, employees, agents and volunteers, as additional insureds under such insurance policies on a **primary and non-contributory coverage** basis, under the following required coverages: (1) commercial general liability insurance with minimum coverage limits applicable to bodily injury (and property damage) in the coverage limit of at least \$1,000,000 per person and \$1,000,000 per occurrence together with an excess umbrella liability policy in the coverage limits of at least \$1,000,000, excess over required underlying coverages. Such insurance policies shall also provide an endorsement deleting any policy coverage exclusion relating to the “insured’s work” or similar exclusion purporting to exclude bodily injury or property damage arising out of the work or services to be performed by Independent Contractor hereunder; (2) auto liability insurance coverage (minimum coverage amount of \$1,000,000 Any Auto; Symbol 1), together with an excess umbrella liability policy in the coverage limit of at least \$1,000,000, excess over required underlying coverage; (3) workers compensation and employers’ liability insurance coverage for all employees and subcontractors of the Independent Contractor as follows: (i) coverage A workers compensation statutory benefits; (ii) Employers’ Liability (Coverage B) - \$25,000 coverage limit for each accident.
- (c) Reimbursement for Negligent Property Damage. In addition to the insurance requirements of this Agreement, Independent Contractor shall reimburse the District for damages by Independent Contractor to any and all personal and/or real property due to negligence of the Independent Contractor.
- (d) Time of the Essence. The Independent Contractor recognizes that time is of the essence due to the specialized single purpose of the District.
- (e) Disputes; Interpretation; Opportunity to Consult Counsel; Venue. Any controversies arising under this Contract that cannot be resolved by the parties shall be subject either to mediation and if mediation fails then legal action may be instituted and any prevailing party shall be entitled to be reimbursed for all court costs and reasonable attorneys’ fees incident to such legal action. All interpretations of this Contract shall be governed by the laws of the State of

Florida. Each party has had ample opportunity to seek the advice of legal counsel prior to entering this Contract, which shall not be construed against the party responsible for drafting the instrument. In the event it is necessary for either party to initiate legal action regarding this Contract, venue shall be in the Nineteenth Judicial Circuit, in and for St. Lucie County, Florida, for claims under state law, and in the Southern District of Florida for claims justiciable in federal court.

- (f) Alternate Services if Breach. If the Independent Contractor ceases work or otherwise breaches this Contract the District has the authority without penalty direct or indirect to contract for the relevant services to be performed by other independent contractors given the nature and specialized single purpose of the District that infrastructure be constructed, acquired and maintained timely at sustained levels of quality over the long term.
- (g) Indemnification. In addition to the insurance requirements of subsection (b) above, Independent Contractor also agrees forever to indemnify, defend and hold harmless the District, Special District Services, Inc., and their respective officers, employees, and agents of and from all losses, liabilities, damages, claims, actions, legal proceedings, settlements, judgments, recoveries, costs, and expenses because of or resulting from loss of, or damage to, property, or injury to or deaths of persons in any way arising out of or in connection with the performance of this Contract and attributable to the negligence or other wrongful conduct of the Independent Contractor or its employees, agents, or subcontractors, including but not limited to any loss or action resulting from the failure of the Independent Contractor to comply with the its obligations under this Contract. The Independent Contractor shall also cause the above indemnification obligations to be confirmed, by insurance policy endorsement, as liabilities and obligations of the Independent Contractor which are covered as insured obligations under the insurance coverage requirements set forth in subsection (b) above.
- (h) Severability. The terms of this Contract shall be severable such that, if any term is determined to be illegal, invalid, or unenforceable, such holding shall not affect the viability of any of the other provisions of the Contract, unless the severing of such item would defeat the purpose of this Contract.
- (i) Waiver. No delay or failure on the part of any party in exercising any right, power, or privilege under this Contract shall impair any such right, power, or privilege or be construed as a waiver or acquiescence; nor shall any single or partial exercise of any right, power, or privilege preclude any other or further exercise thereof or the exercise of any other right, power, or privilege. No waiver shall be valid against any party unless made in writing and signed by the party against whom enforcement of the waiver is sought and then only to the extent expressly specified in such writing.

- (j) Sovereign Immunity. Notwithstanding any other term, condition or provision of this Contract to the contrary, the District, and also including the District Manager, and its employees, who are agreed to be acting as statutory agents of the District, pursuant to Florida Statute §768.28(9) and who intends to avail themselves, whether individually or collectively, of the benefits of Section 768.28, Florida Statutes, and of other statutes and common law governing sovereign immunity. In no event will the District's liability exceed the monetary limits set forth in Section 768.28, Florida Statutes. Nothing in this Contract (1) is intended to inure to the benefit of any third party, other than, and with the specific exception of the District Manager, and its employees, all of whom are confirmed to be statutory agents of the District and who are specifically and affirmatively intended as beneficiaries of this Agreement and of the sovereign immunity provisions of Florida Statute Section 768.28(9), for the purpose of allowing any claim that would otherwise be barred under the doctrine of sovereign immunity or by operation of law or (2) shall be construed as consent by an agency or political subdivision of the State of Florida, or by its District Manager, to be sued by third parties in any manner arising out of any contract, and including any claim or cause of action for damages to the extent that such matters are included within the sovereign immunity provisions of §768.28, Florida Statutes and, specifically including, but not limited to §768.28(9), Florida Statutes.
- (k) Execution; Successors and Assigns. This Contract may be executed in counterparts (including by facsimile or other electronic imaging), any one of which shall be deemed an original and all of which collectively shall be deemed a single instrument. This Contract shall be binding upon and inure to the benefit of the parties and their respective officers, directors, agents, employees, administrators, trustees, executors, receivers, successors, assignees and legal representatives, whether or not a signatory to this Contract.
- (l) Verification of Employment Status. The Independent Contractor shall bear full responsibility for verifying the employment status, under the Immigration Reform and Control Act of 1986, of all persons the Independent Contractor employs in the performance of this Contract. In furtherance of this requirement, the Independent Contractor shall: (1) register with and use the United States Department of Homeland Security's E-Verify system to verify the employment eligibility of all new employees hired by the Independent Contractor during the term of this Contract; and (2) if the Independent Contractor enters into an agreement with a subcontractor during the term of this Contract, (i) obtain from the subcontractor an affidavit stating that the subcontractor does not employ, contract with, or subcontract with an "unauthorized alien," as that term is defined in Section 448.095(1)(k), Florida Statutes, and (ii) maintain a copy of such affidavit for the duration of this Contract, a copy of which shall be provided to the District upon request.
- (m) Scrutinized Companies

- i) The Independent Contractor certifies that it and its subcontractors are not on the Scrutinized Companies that Boycott Israel List and are not engaged in the boycott of Israel. Pursuant to section 287.135, Florida Statutes, the District may immediately terminate this Agreement at its sole option if the Firm or any of its subcontractors are found to have submitted a false certification; or if the Independent Contractor or any of its subcontractors, are placed on the Scrutinized Companies that Boycott Israel List or is engaged in the boycott of Israel during the term of this Agreement.
- ii) If this Agreement is for one million dollars or more, the Independent Contractor certifies that it and its subcontractors are also not on the Scrutinized Companies with Activities in Sudan List, Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or engaged in business operations in Cuba or Syria as identified in Section 287.135, Florida Statutes. Pursuant to Section 287.135, the District may immediately terminate this Agreement at its sole option if the Independent Contractor, or any of its subcontractors are found to have submitted a false certification; or if the Independent Contractor or any of its subcontractors are placed on the Scrutinized Companies with Activities in Sudan List, or Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or are or have been engaged with business operations in Cuba or Syria during the term of this Agreement.
- iii) The Independent Contractor agrees to observe the above requirements for applicable subcontracts entered into for the performance of work under this Agreement.
- iv) The Independent Contractor agrees that the certifications in this section shall be effective and relied upon by the District for the term of this Agreement, including any and all renewals.
- v) The Independent Contractor agrees that if it or any of its subcontractors' status changes in regards to any certification herein, the Independent Contractor shall immediately notify the District of the same.
- vi) As provided in Subsection 287.135(8), Florida Statutes, if federal law ceases to authorize the above-stated contracting prohibitions then they shall become inoperative.
- (n) Public Records. The Independent Contractor agrees to comply with Florida Statutes regarding public records and specifically agrees to:
 - i) Keep and maintain public records required by the District in order to perform the service.

ii) Upon request from the District, provide the District with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided for by Florida Statutes.

iii) Ensure that public records that are confidential or exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of this Agreement and following completion of this Agreement if the Independent Contractor does not transfer the records to the District.

iv) Upon termination of this Agreement, Independent Contractor shall transfer, at no cost to the District, all public records in possession of the Independent Contractor and destroy any duplicate public records if any. Independent Contractor shall transfer the public records in a format that is compatible with the information technology systems of the District

PUBLIC RECORDS NOTICE: IF THE INDEPENDENT CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO ITS DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS FOR THE DISTRICT, SPECIAL DISTRICT SERVICES, INC., AT 772-345-5119, 10807 SW TRADITION SQUARE, PORT ST. LUCIE, FLORIDA 34987.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the date first above written.

**Tradition Community
Development District No. 1**
c/o Special District Services, Inc.
10807 SW Tradition Square
Port St. Lucie, FL 34987
Phone: (772) 453-0975
bsakuma@sdsinc.org

By: 

Title: Chare

Date: 7/8/2025

**RYPER WATER ANALYTICS
LLC**
180 South Knowles Ave, Ste. 9
Winter Park, FL 32789
Phone: (407) 537-9878
Ryan@ryperwater.com

By: 

Title: President

Date: July 8, 2025

June 30, 2025

Mr. B. Frank Sakuma, Jr., CDM
District Manager
Special District Services, Inc.
2501A Burns Rd.
Palm Beach Gardens, FL 33410

Subject: **Professional Consulting Services for Irrigation System Revenue Sufficiency Study**

Dear Mr. Sakuma:

Attached for your consideration is the proposed scope of services, contract budget, and project schedule for Ryper Water Analytics LLC ("Ryper") to prepare a revenue sufficiency analysis for Tradition Community Development District's ("Tradition CDD") irrigation water utility system (the "System").

This proposed work authorization provides services detailed in the attached scope of services for total compensation of thirty thousand five hundred dollars (\$30,500). The terms reflected in this proposed work authorization will be accepted by the issuance of a Purchase Order by Tradition CDD, which shall be effective for thirty (30) days from the date of submission of the proposal.

We appreciate the opportunity to assist Tradition CDD relative to its utility system. The receipt of the Purchase Order from Tradition CDD which accepts the scope and terms of this proposed work authorization will serve as our notice to proceed. If you should have any questions regarding the proposed work authorization, please do not hesitate to contact us.

Respectfully,

Ryper Water Analytics,



Ryan Smith

TRADITION COMMUNITY DEVELOPMENT DISTRICT PROFESSIONAL CONSULTING SERVICES FOR IRRIGATION SYSTEM REVENUE SUFFICIENCY STUDY

OBJECTIVE

Tradition Community Development District ("Tradition CDD") and Ryper Water Analytics, LLC ("Ryper") have entered into this general services agreement (the "Agreement") to provide financial planning and rate consulting services for Tradition CDD's irrigation water utility system (the "System"). The primary objectives of the scope of service to be performed for Tradition CDD include the preparation of: 1) a five (5) year financial forecast of utility revenue requirements; 2) a five (5) year capital funding analysis; and 3) recommended rate adjustments for the upcoming fiscal year 2026 (the "Project").

SCOPE OF SERVICES

The scope of services to be performed by Ryper has been presented in a series of primary tasks based on the objectives of Tradition CDD. The following is the scope of services to be performed by Ryper associated with this Project:

Task 1 – Kickoff and Data Acquisition/Compilation Review: Ryper will prepare a data request to initiate the Project and to compile statistical and financial information from Tradition CDD. Ryper will interview staff members to collect capital and planning documentation as well as other relevant information needed to perform the revenue sufficiency analysis and in support of the capital funding plan for the System. Data that will be requested will include, but not be limited to, the following: i) financial data such as the adopted Fiscal Year 2025 and proposed Fiscal Year 2026 System operating budget and financial statements detailing recent historical operating results; ii) available cash balances by each specific fund; iii) the most recent capital improvement plan including any carry-forward projects approved in prior years that are still in process; iv) customer billing and sales statistics; v) financing and debt-related information; vi) utility rate, operational, and engineering data; and vi) other information as deemed necessary by Ryper to prepare the System's financial forecasts.

Task 2 – Development of Customer Usage Forecast: Ryper will evaluate and present statistical information as provided by Tradition CDD to review overall System demand requirements. The purpose of this analysis will be to identify trends in usage relationships by rate or billing classes. Based on historical trends in customer growth/usage requirements, and discussions with Tradition CDD staff relative to development/re-development and growth within the System's service areas as well as potential modifications to customer needs, Ryper will prepare a customer and sales forecast for the System for the six-fiscal year period ending 2030 (the "Forecast Period").

Task 3 – Development of Revenue Projections from Existing Rates: This task involves the development of System rate revenues for the Forecast Period from existing rates recognizing the results of the customer and sales forecast performed in Task 2. Additionally, this task will involve a rate-revenue "reasonableness" test (reconciling model results to reported amounts on Tradition CDD financial statements) to ensure that the revenue model and billing determinants are reasonable, relative to the modeling process.

This task will also involve the projection of other operating revenues, interest income earned on unrestricted fund balances as defined in Tradition CDD's loan agreements for the System or as may have been created by Tradition CDD on behalf of the System, and revenues derived from other miscellaneous utility transactions (e.g., customer service charges).

Task 4 – Development of Operating Expense Projections: This task involves the development of a projection of the estimated amount of annual operating and maintenance expenses (the "Operating Expenses") that have been identified to be funded from System rate revenues for the Forecast Period. This task will be performed in sufficient detail to: i) recognize the primary expenses incurred by the System; ii) assist in the projection of expenditures for the applicable Forecast Period; iii) recognize changes in operating costs due to changes in regulatory requirements, service area expansions, utility operations; and iv) recognize the implementation of the capital improvement program. Finally, other operating expenses such as inter-fund transfers, administrative allocations, contingency reserves, insurance needs, and other expenses will be evaluated to promote "full cost recovery".

Task 5 – Capital Improvement and Funding Analysis: This task involves working with Tradition CDD to identify the System's applicable capital improvement program for the Forecast Period and to develop a funding analysis to identify available sources of funds for financing of the capital improvement program and the estimated impact on the System's rate revenues associated with the capital funding programs for the Forecast Period. The forecast will assume a "fully funded" capital plan for all capital projects identified by Tradition CDD. This task will also involve a review of all restricted/unrestricted fund balances available for financing the capital improvement program, identification of the status of current capital projects currently in process, assistance in the funding of the capital programs, or the identification of the timing of when funds should be expended for the capital facilities. As part of this task, Ryper will also evaluate prior period capital projects that are still underway, and which have a claim on the existing financial resources of the System (construction-work-in-progress). Additionally, this task will include the development of a cash flow model by the specific fund to evaluate System liquidity and the availability of funds to finance the capital program. Finally, a review of the capital re-investment rate (also referred to as Pay-Go funding) will be considered to provide a programmed funding level for ongoing utility plant replacement, renewals, rehabilitation, and upgrades from the System's rates.

Task 6 – Other Revenue Requirement Identification and Management Dashboard: To meet the financial obligations of Tradition CDD, Ryper will review the financial aspects of the System to potentially recognize other revenue requirements that may need to be allocated or included in the revenue sufficiency analysis. This task will include assistance in the development of fiscal targets in terms of working capital maintenance, the funding of capital re-investment for long-term planning needs, the funding of other departmental capital or maintenance reserves for items such as vehicles and equipment, and the recognition of any other transfer requirements that may be associated with the System. As part of this task, Ryper will develop "management dashboards" for the System to allow for the review of the financial position of the System and the ability to perform sensitivity analyses to finalize the capital funding plan and financial forecast. Ryper will work with Tradition CDD to identify any fiscal policies and financial performance targets that will provide guidelines and support for the financial forecast and fiscal policies necessary to address the goals related to financial performance, such as debt service coverage ratios and reserve fund levels that Tradition CDD may deem necessary for the System.

Task 7 – Compliance Analysis: This task will be conducted to identify the ability of the recommended rates to meet any rate covenant and flow of fund requirements as defined in the governing loan agreements (proposed SRF loans) that authorized the issuance of the debt for the System. The compliance analysis will be performed for the Forecast Period to maintain the financial integrity of Tradition CDD. If required, this compliance analysis will also include an evaluation of the additional bonds test for the System to determine that the issuance of the additional utility revenue bonds on a senior, and/or subordinate lien basis with the outstanding indebtedness will be met to fund future capital needs.

Task 8 – Development of Net Revenue Requirements and Rate Impact Analyses and Staff Presentation: Based on the aforementioned tasks, Ryper will prepare a summary of the total net revenue requirements of the System and the accompanying rate impact requirement for each fiscal year of the Forecast Period. An on-site meeting will be held with Tradition CDD staff to present the results of the initial project findings and results. Based on the results of the staff meeting, Ryper will make modifications to the analyses prior to the delivery of the revenue sufficiency analyses and capital funding plan.

Task 9 – Rate and Fee Comparisons with Other Utilities: Ryper will prepare comparisons of the existing and proposed irrigation water rates (monthly service charges) with those of other neighboring or similar utilities. This will provide a comparison of Tradition CDD's rates to the irrigation rates of other neighboring.

Task 10 – Report and Presentation of Project Results and Findings: Ryper will prepare a report and summary presentation documenting all of our analyses, assumptions, and considerations for final review by Tradition CDD staff. Based on Tradition CDD's staff review and comments, Ryper will make any modifications to the analysis prior to the submission of the recommendations for Tradition CDD Board consideration.

Task 11 – Public Hearing: To present the results, recommendations, and rates to Tradition CDD's Board and the public with respect to the recommendations as delineated in the report, Ryper will attend one public hearing with Tradition CDD's Board. Ryper will submit materials related to the presentation one week in advance of Tradition CDD's Board workshop meeting.

MEETINGS

During the course of this engagement, it is anticipated that Ryper will attend a total of two (2) on-site meetings and several teleconference meetings consisting of:

- one on-site meeting to review initial revenue requirements with Tradition CDD staff; and
- one on-site meeting to present the results of the Study to the Tradition CDD Board.

The attendance of any additional on-site meetings will be considered to be an additional service. For the purposes of the scope of services and the development of the project cost estimate shown in Exhibit A, an allowance for 6 hours per meeting per Ryper representative has been assumed.

STAFF ASSISTANCE

As with any major study, Tradition CDD's staff will be called upon to provide assistance to Ryper to complete the engagement on a timely basis. The following is a list of the activities anticipated to be performed by the staff of Tradition CDD:

1. The gathering of specific customer, operational, and financial data and information relative to the Project;
2. The performance of certain analyses relative to the compiling of data if not in a usable format in general records and reports of Tradition CDD;
3. Aiding in the formulation of policy decisions relative to cost or need determination, cost allocations, and rate recommendations. An example would include capital improvements project prioritization, etc.; and
4. Performing a general review and providing comments relative to the results of our analyses.

ADDITIONAL SERVICES

During the course of the Project, Tradition CDD may request additional services relative to the performance of the revenue sufficiency analysis from Ryper. Such services will not be conducted until authorized by Tradition CDD. All invoices for additional services performed by Ryper will be based on the hourly rate schedule of Ryper members as identified in Exhibit A of this proposal or on some other basis as mutually agreed between Tradition CDD and Ryper. Although no additional services are anticipated for this engagement, examples of additional services may include the following:

1. Attendance of meetings with Tradition CDD staff, Tradition CDD Board or interested parties, or public hearings in addition to what is contemplated in the scope of services.
2. The derivation of rate design analyses beyond what is contemplated in the scope of services.
3. Design of other rates, miscellaneous service charges, or connection fees not specifically addressed in the scope of services.
4. Performance of any annual update to the financial forecast after completion of the Project.
5. Delays in the Project schedule at no fault to Ryper, which may have impacts on analyses performed, and which would affect the budget for the scope of services reflected herein.

SCHEDULE

Ryper will begin work on the Project upon receipt of a purchase order from Tradition CDD. Ryper will endeavor to complete the Scope of Services within the timeframe of Tradition CDD 's schedule to complete the Project, subject to any excused delay occasioned by factors beyond Ryper's reasonable control. Based on data availability, Ryper intends to complete the analyses within 120 days of notification to proceed.

PROPOSED FEES

Ryper shall bill for the services described above on a not-to-exceed budget based on actual hours incurred by Ryper personnel and actual materials costs (if any), except as may be modified by Tradition CDD and Ryper, in an amount not to exceed \$30,500. A further breakdown of the estimated Ryper personnel hours and proposed fees is shown below in Exhibit A.

Exhibit A – Cost Estimate			
Description	Project Manager	Financial Analyst	Total
Direct Labor Rates	\$200	\$125	
Task 1 – Kickoff and Data Acquisition/Compilation Review	4	4	8
Task 2 – Development of Customer Usage Forecast	8	14	22
Task 3 – Development of Revenue Projections from Existing Rates	8	12	20
Task 4 - Development of Operating Expense Projections	6	8	14
Task 5 - Capital Improvement and Funding Analysis	12	10	22
Task 6 – Other Revenue Requirement & Management Dashboard	6	6	12
Task 7 - Compliance Analysis	6	8	14
Task 8 - Development of Net Revenue Requirements	6	8	14
Task 9 – Rate and Fee Comparisons with Other Utilities	4	10	14
Task 10 – Report and Presentation of Study Results and Findings	14	12	26
Task 11 – Public Hearing	4	4	8
Meetings (allowance of 6 hours per meeting) (2 total)	12	0	12
Total Hours	90	96	186
Total Labor Cost	\$18,000	\$12,000	\$30,000
Travel Allowance			\$500
Total Project Budget			\$30,500

To: Board of Supervisors

From: Jesse Wargo, Assistant District Manager

Date: June 23, 2025

Board Meeting Date: August 6, 2025

SUBJECT

Work Authorization (WA) WA-19-143-193; 12483 SW Sunrise Lake Terrace - Pool

STAFF RECOMMENDATION

Ratify CDD Engineer's approval of the proposed temporary use of the CDD Water Management Tract under the following conditions.

1. Schedule a preconstruction meeting with the CDD prior to start of any construction.
2. Sediment and turbid water shall be prevented from entering the CDD's stormwater management system. This typically includes installation of silt fence, trenched into the ground, on the water side of any soil stock piled within or adjacent to the CDD Stormwater Management Tract.
3. Ground surface within the Surface Water Management tract shall be regraded and sodded to its original condition including its original slope within 6 months of land disturbance.
4. Any sediment or soil entering the lake shall be removed immediately.

GENERAL INFORMATION

On June 6 2025, the Tradition CDD Engineer received a request to temporarily use a portion of the upland portion of the Water Management Tract located on parcel ID 4316-211-0003-000-1, which has been accepted by the CDD for operation and maintenance. Once the pool has been constructed, the CDD property will be restored to pre-construction conditions.

DISTRICT LEGAL COUNSEL REVIEW

Not applicable.

FUNDING REVIEW

This project is not expected to impact the CDD Stormwater System operational budget.

**Tradition Community Development District
BOARD AGENDA ITEM
Board Meeting Date: August 6, 2025**

Subject: TR - 12483 SW Sunrise Lake Terrace - Pool
Work Authorization No. WA-19-143-193
C&T Project No. 19-143.TR6.037.0625.R

Background:

On June 6 2025, the Tradition CDD Engineer received a request to temporarily use a portion of the upland portion of the Water Management Tract located on parcel ID 4316-211-0003-000-1, which has been accepted by the CDD for operation and maintenance. Once the pool has been constructed, the CDD property will be restored to pre-construction conditions.

Recommended Action:

Ratify CDD Engineer's approval of the proposed temporary use of the CDD Water Management Tract under the following conditions.

1. Schedule a preconstruction meeting with the CDD prior to start of any construction.
2. Sediment and turbid water shall be prevented from entering the CDD's stormwater management system. This typically includes installation of silt fence, trenched into the ground, on the water side of any soil stock piled within or adjacent to the CDD Stormwater Management Tract.
3. Ground surface within the Surface Water Management tract shall be regraded and sodded to its original condition including its original slope within 6 months of land disturbance.
4. Any sediment or soil entering the lake shall be removed immediately.

Location: Tradition Community Development District CDD.06

Within Tradition Irrigation Service Area? Yes

Fiscal Information: This project does not include infrastructure dedicated to the CDD. It is not expected to impact the CDD Stormwater System operational budget.

Grant Related? No

Additional Comments: None

Board Action:

Moved by:

Seconded by:

Action Taken:

Item Prepared by: Stefan K. Matthes, PE

June 23, 2025



0 1,000 2,000
Feet

TR - 12483 SW Sunrise Lake Terrace - Pool
WA#: 19-143-193
Project #:19-143.TR6.037.0625.R

Legend

- Subject Property
- Other Parcels



**CULPEPPER &
TERPENING INC**

Work Authorization #:
19-143-193
Project #:
19-143.TR6.037.0625.R
Scale: 1" = 2,000'
Date: 6/11/2025

EXHIBIT 1
TR - 12483 SW SUNRISE
LAKE TERRACE - POOL
SITE LOCATION MAP

To: Board of Supervisors

From: Jesse Wargo, Assistant District Manager

Date: August 6, 2025

Board Meeting Date: August 6, 2025

SUBJECT

Consider Resolution No. 2025-16; Adopting Fiscal Year 2025/2026 Annual Meeting Schedule

STAFF RECOMMENDATION

Staff recommends approving Resolution No. 2025-16 for District Nos. 1-11; Adopting the district's fiscal year 2025/2026 annual meeting schedule.

GENERAL INFORMATION

A resolution of the board of supervisors of the Tradition Community Development District Nos. 1-11 adopting the district's fiscal year 2025/2026 annual meeting schedule.

DISTRICT LEGAL COUNSEL REVIEW

N/A

FUNDING REVIEW

N/A

RESOLUTION 2025-16

**A RESOLUTION OF THE BOARD OF SUPERVISORS OF
THE TRADITION COMMUNITY DEVELOPMENT
DISTRICT NO'S. 1-11 ADOPTING THE ANNUAL
MEETING SCHEDULE FOR FISCAL YEAR 2025-2026**

WHEREAS, the Tradition Community Development District No's. 1-11 (the "Districts"), are a local unit of special-purpose government created and existing pursuant to Chapter 190, Florida Statutes, being situated entirely within the St. Lucie County, Florida; and

WHEREAS, the Districts are required by Florida law to prepare an annual schedule of their regular public meetings which designates the date, time and location of the District's meetings; and

WHEREAS, the Board has proposed the Fiscal Year 2025-2026 annual meeting schedule as attached in **Exhibit A**;

**NOW, THEREFORE, BE IT RESOLVED BY THE BOARD
OF SUPERVISORS OF TRADITION COMMUNITY
DEVELOPMENT DISTRICT NO'S. 1-11:**

1. The Fiscal Year 2025-2026 annual public meeting schedule attached hereto and incorporated by reference herein as Exhibit A in hereby approved and will be published in accordance with the requirements of Florida law.

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

PASSED AND ADOPTED THIS 6th DAY OF AUGUST, 2025.

ATTEST:

**TRADITION COMMUNITY
DEVELOPMENT DISTRICTS NO'S. 1, 2 &
7-11**

Secretary (B. Frank Sakuma, Jr.)

Chairman

ATTEST:

**TRADITION COMMUNITY
DEVELOPMENT DISTRICTS NO. 3**

Secretary (B. Frank Sakuma, Jr.)

Chairman

ATTEST:

**TRADITION COMMUNITY
DEVELOPMENT DISTRICTS NO. 4**

Secretary (B. Frank Sakuma, Jr.)

Chairman

ATTEST:

**TRADITION COMMUNITY
DEVELOPMENT DISTRICTS NO. 5**

Secretary (B. Frank Sakuma, Jr.)

Chairperson

ATTEST:

**TRADITION COMMUNITY
DEVELOPMENT DISTRICTS NO. 6**

Secretary (B. Frank Sakuma, Jr.)

Chairman

EXHIBIT “A”

TRADITION COMMUNITY DEVELOPMENT DISTRICT NOS. 1-11 FISCAL YEAR 2025/2026 REGULAR BOARD MEETING SCHEDULE

NOTICE IS HEREBY GIVEN that the Tradition Community Development District Nos. 1-11 (“Districts”) will conduct Regular Board Meetings of the Board of Supervisors (“Board”) for the purpose of conducting the business of the Districts that may properly come before the Board. The following meetings will be held at 11:00 a.m. at Tradition Town Hall located at 10799 SW Civic Lane, Port St. Lucie, Florida 34987 on the following dates:

October 1, 2025

November 5, 2025

December 3, 2025

January 7, 2026

February 4, 2026

March 4, 2026

April 1, 2026

May 6, 2026

June 3, 2026

July 1, 2025

August 5, 2026

September 2, 2026

***Irrigation Rate Committee Meeting - 9:00am**

Southern Grove CDD Meeting - 10:30am

Tradition CDD Meeting - 11:00am

An Irrigation Committee Meeting will take place at 9:00 a.m. at Tradition Town Hall located at 10799 SW Civic Lane, Port St. Lucie, Florida 34987 on the above dates, as indicated.

To: Board of Supervisors

From: Jesse Wargo, Assistant District Manager

Date: July 28, 2025

Board Meeting Date: August 6, 2025

SUBJECT

Discussion and Consideration of District Legal Counsel.

STAFF RECOMMENDATION

Staff has had a productive working relationship with both the current District Legal Counsel and Kutak Rock LLP, and recognizes the professionalism and capabilities of each. While staff does not express a preference between the two, we understand the Board's interest in considering new legal representation. In that context, staff supports moving forward with the proposal from Kutak Rock LLP, should the Board determine that a change in counsel is in the best interest of the District.

GENERAL INFORMATION

Kutak Rock LLP has advised clients on the operation and governance of community development districts since 1985. Attorneys in their Public Finance and Special Districts practice currently serve as counsel to more than 340 special districts across Florida and have assisted in the establishment of many others.

Their attorneys routinely advise on a wide range of legal matters affecting special districts, including but not limited to:

- District establishment at the city, county, and state levels
- Public finance and bond counsel services
- Procurement and contract matters
- Property acquisitions and real estate conveyances
- Rulemaking, ethics, and Sunshine Law compliance
- Boundary amendments and district mergers
- Imposition and collection of assessments, including foreclosure proceedings
- Construction law and related legal matters

DISTRICT LEGAL COUNSEL REVIEW

The current District Legal Counsel will review the proposed engagement agreement for legal form and sufficiency..

FUNDING REVIEW

Funding for District Legal Counsel services is included in the approved Fiscal Year 2024–2025 Budget.

Proposal to Serve as District Counsel



Prepared for

The Tradition and Southern Groves
Community Development Districts

Kutak Rock LLP
107 W College Ave
Tallahassee, Florida 32301
office 850.692.7300

Jonathan T. Johnson
850.692.7301
jonathan.johnson@kutakrock.com

Via Email

July 28, 2025

B. Frank Sakuma, Jr., CDM
District Manager
Special District Services, Inc.
10807 SW Tradition Square
Port St. Lucie, FL 34987

Re: Proposal to Serve as District Counsel for the Tradition and Southern Groves Community Development Districts

Dear Mr. Sakuma:

Kutak Rock is pleased to submit the enclosed proposal to the Tradition and Southern Groves Community Development Districts ("Districts") to provide general counsel and related services. This representation is ideally suited for our firm, and I am excited about this opportunity to support the Districts.

Kutak Rock is a national, full-service law firm with more than 550 attorneys located throughout 19 U.S. cities, including 21 attorneys and 5 paralegals located in Florida. The firm serves local, regional and national clients in a broad commercial and municipal practice that spans more than two dozen service areas.

Our Florida District Counsel Group has decades of experience at every level of government and in virtually every part of our home state of Florida. We serve as general counsel, including as issuer's counsel relative to special district financings, to special districts across Florida, including many community development districts ("CDD") and multi-county stewardship districts for some of Florida's largest community development projects.

For service to the Districts, I would be your lead partner and work primarily out of our office in Tallahassee. I am a core member of the firm's Florida District Counsel Group and have 30+ years of experience representing special districts throughout the State. I would be joined as needed by Lindsay Whelan and

Wes Haber, both partners who concentrates in community development districts, and Bennett Davenport, who would provide associate support. In light of our experience with other CDDs in the state dealing with similar issues, we believe that we will be able to serve the Districts well in advising on various aspects of their operations and management. We are open to attending meetings virtually or in person as may be required or requested.

We are pleased to respond to your request for a proposal and welcome the opportunity to discuss how we can partner with you. Please contact me anytime at 850.692.7301 or Jonathan.Johnson@kutakrock.com.

Sincerely,

A handwritten signature in blue ink, appearing to read 'Jonathan T. Johnson', with a stylized flourish at the end.

Jonathan T. Johnson

Enclosure

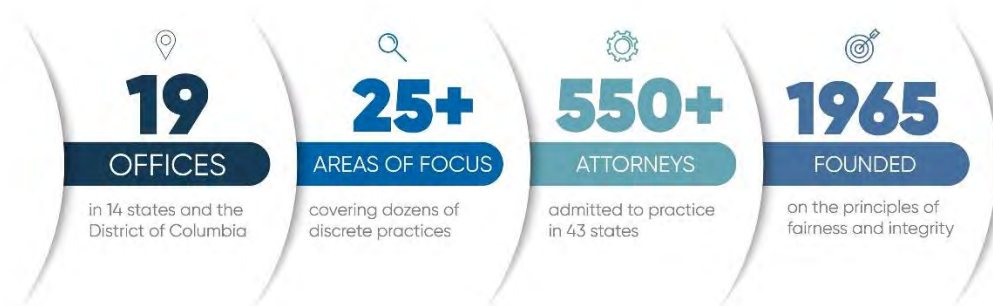
About Kutak Rock

Kutak Rock LLP was established on the principles of fairness and integrity, an unwavering commitment to our communities, and dedication to a supportive and engaged workplace. Founded in Omaha in 1965, the firm has grown to 19 offices in 14 states and the District of Columbia, providing broad nationwide coverage and relentless attention to client service.

With offices located in Atlanta, Chicago, Denver, Fayetteville, Irvine, Kansas City, Los Angeles, Little Rock, Minneapolis, Omaha, Philadelphia, Richmond, Rogers, Scottsdale, Spokane, Springfield, Tallahassee, Washington, D.C. and Wichita, and attorneys admitted to practice in 43 states, our national footprint allows us to serve our clients wherever their legal needs arise.

Many of our 550+ attorneys are recognized industry leaders in their practices, allowing us to serve our clients across a panoply of subject-matter areas, and we have earned a reputation across the U.S. for providing excellent legal services in a practical, cost-conscious manner.

Founded as a finance firm, Kutak Rock's corporate and governmental finance capabilities are wide-ranging and renowned in the industry and the firm's multidisciplinary practice now spans dozens of discrete practices in more than 25 [areas of focus](#).



Kutak Rock's Florida District Counsel Group

Kutak Rock is a national law firm with a signature practice focused in the areas of special districts, administrative and governmental law, appellate practice, utility law, elections law, governmental affairs, public contract law and trial practice. **Our Florida District Counsel Group has decades of experience at every level of government and in virtually every part of our home state of Florida. We routinely navigate the labyrinths of governmental law, from financing infrastructure via special districts to guiding complex real estate transactions to drafting and advocating for the passage of legislation that governs Florida special districts. The competence and extensive experience of our lawyers is critical to providing the highest level of client service.**

Personnel and Other Resources

Our Florida District Counsel Group has 19 full time attorneys two part-time attorneys who spend 100% of their legal practice in the area of special districts. We also have a partner, Joseph Brown, who spends part of his time representing special districts and also provides in house litigation and real estate support. Our knowledge and experience mean that our lawyers can provide services efficiently, and we offer flexible and competitive pricing arrangements based on client needs and circumstances. To ensure responsiveness, we are able to work in small teams, while keeping costs low by using associate lawyers or paralegals where appropriate. At present, we have five paralegals in our firm who work primarily with special districts.

Experience with Special Districts

Providing clients with advice regarding the operation of community development districts since 1985, lawyers from our group presently serve as counsel to **more than 340 special districts throughout Florida** and have established a number of others. We regularly address all facets of legal issues affecting special districts, including establishment at city, county and state levels, public finance, procurement, acquisitions, rulemaking, open meetings and records, ethics, real property conveyances, contracts, construction, boundary amendments, mergers, assessments, foreclosure and other such issues.

We currently represent several districts in the southeast part of Florida, including in St. Lucie County, Broward County, Palm Beach County, Miami-Dade County and Martin County. Further, notable clients include some of the largest and most complex special districts in Florida, such as Lakewood Ranch Stewardship District, which encompasses over 23,250 acres in Sarasota and Manatee Counties; the Boggy Creek Improvement District, home to the new “medical city” in Orlando; and the Babcock Ranch Independent Special District, a special district located in Lee and Charlotte counties. Several of our clients own and operate multiple amenities and are home to thousands of residents. We also represent several resident-elected boards in smaller communities around the state and we are well versed in helping such boards navigate the needs that are important to their constituents and communities.

Understanding Scope of Work

We provide necessary legal services for special districts. This work varies widely by project but usually includes (1) advice on governmental meetings, ethics, and procurement matters, (2) assistance with maintenance contracts and activities, and (3) other legal needs of the district.

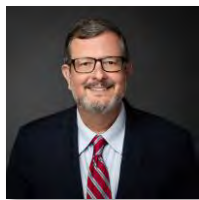
In addition to our virtual or physical attendance at Board meetings, our group would work with the Board and District staff to prepare the Board meeting agendas, participate in agenda conference calls, and prepare various documents for distribution in the agenda packages. After a Board meeting, we would follow up with the Board and District staff to address any outstanding issues and answer any questions raised at the Board meeting. We would also be available by phone or email to promptly resolve issues that arise between meetings.

Our group would also navigate the ever-changing laws and regulations affecting the Districts. When changes occur, we would promptly advise the Board of these changes and work with District staff to update or adopt new policies when applicable. Recent examples include the ADA website implementation and fraud/waste/abuse policies. Our firm was able to monitor the legislation, research the issues, and draft the policies for all of our clients spreading out the cost accordingly. This quick response not only saves the Districts money when crafting new policies but also prevents the expense and liability stemming from being noncompliant with the law.

Our group's experience in proactively counseling community development districts gives us insight on how to prevent expensive litigation. Often, thoughtful actions taken at the earliest stages of a dispute can save tens of thousands of unbudgeted dollars. However, not all litigation can or should be avoided. Our firm has access to several full-time litigation attorneys to protect the Districts' interests if litigation arises.

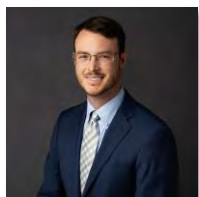
Proposed Team

Jonathan Johnson would serve as the principal contact for Kutak Rock's work performed on behalf of the Districts and lead a team of Florida-based attorneys. The qualifications of the proposed team can be found below:



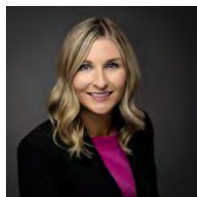
Jonathan Johnson focuses his practice on stewardship districts, community development districts and other special district work, including infrastructure financing, land development, and local government law. Jonathan counsels landowners, developers, bondholders and other parties regarding financing and managing of infrastructure requirements for new and developing communities including the establishment of special taxing districts; serves as general counsel to a number of stewardship districts, special districts, and community development districts; and advises clients on bond issuance, lease-purchase financing, contracts, bid processes and protests, construction matters, and other land development, local government and financial matters.

Jonathan received a B.S. and M.S. from Florida State University and graduated with Honors from the Texas Tech University School of Law. He is licensed to practice in Florida.



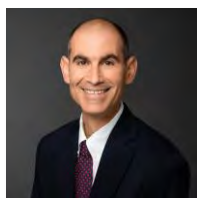
Bennett Davenport focuses primarily on special taxing districts, including both developer and resident controlled districts. His experience includes advising clients on matters relating to government contracting, real property, public procurement and construction, open government and ethics, public finance and land development.

Bennett received a B.A. from Florida State University and a J.D. from Emory University School of Law. He is licensed to practice in Florida.



Lindsay Whelan counsels special districts, landowners, developers and other related parties on matters relating to special district governance, public financing, and land development. Her experience includes: representing special districts and other related parties in matters relating to government contracting, real property, public procurement and construction, open government and ethics, public finance, and land development; representing landowners and developers relative to special district establishment and governance, as well as performing due diligence activities for entities relative to their acquisition of property interests within special districts; representing clients in obtaining restaurant and alcoholic beverage licenses for golf, restaurant, and concession operations; and assisting clients in obtaining state grant moneys from the Florida Sports Foundation and complying with ongoing reporting requirements.

Lindsay received a B.S. from University of North Carolina Wilmington, an M.B.A from Florida State University and graduated *cum laude* from the Florida State University College of Law. She is licensed to practice in Florida.



Wes Haber concentrates in community development districts and other special district work, focusing on infrastructure financing, land development, special districts and local government law. His practice includes: counseling landowners and developers regarding financing and managing of infrastructure requirements for new and developing communities, including the establishment of special taxing districts; serving as general counsel to a number of community development districts; and advising clients on bond issuance, lease-purchase financing, contracts, bid processes and protests, construction matters, and other land development, local government and financial matters.

Wes received a B.S. from the University of Florida and graduated with Honors from the Florida State University College of Law. He is licensed to practice in Florida.

Fee Schedule

Attorneys and professionals who would perform work for the Districts will bill at the hourly rates below.

Attorney	Title	Office	Hourly Rate
Jonathan Johnson	Partner	Tallahassee	\$333
Lindsay Whelan	Partner	Tallahassee	\$333
Wes Haber	Partner	Tallahassee	\$300
Bennett Davenport	Senior Associate	Tallahassee	\$263

Conclusion

As mentioned previously, we represent community development districts throughout the State of Florida. We believe that our experience and resources allow us to represent our clients with a degree of professionalism and cost effectiveness that is unique to our firm. Please take a moment to further review our qualifications at www.kutakrock.com. We would be happy to talk with you about our qualifications and experience. Jonathan Johnson can be reached at 850.692.7301. We look forward to hearing from you.

A reference list of Florida Special District Representation is in the **Appendix**.

Appendix: Florida Special District Representations

Florida Special District Representations By County

Kutak Rock represents more than 340 special districts throughout Florida

Alachua	
Finley Woods	Alachua
Parker Road	Alachua
Springhills North CDD	Alachua
Westone	Alachua
Bay	
Pier Park	Bay
Sweetbay Commercial 1	Bay
Sweetbay Commercial 2	Bay
Sweetbay Residential 1	Bay
Sweetbay Residential 2	Bay
Sweetbay Residential 3	Bay
Sweetbay Residential 4	Bay
Sweetbay Residential 5	Bay
Sweetbay Residential 6	Bay
Sweetbay Residential 7	Bay
Brevard	
Cypress Bay West CDD	Brevard
Emerald Lakes	Brevard
Heritage Isle at Viera	Brevard
Malabar Springs CDD	Brevard
Windward Preserve	Brevard
Brevard/Volusia	
Deering Park Stewardship	Brevard/Volusia
Broward	
Hillcrest	Broward
Charlotte	
Firelight East	Charlotte
Harbor Village CDD	Charlotte
Island Lake Estates CDD	Charlotte
North Loop	Charlotte
Starling	Charlotte
West Port CDD	Charlotte
Charlotte/Lee	
Babcock Ranch	Charlotte/Lee
Citrus	
Crystal Ridge	Citrus
Clay	
Armstrong	Clay
Cross Creek North	Clay
Double Branch	Clay
Feed Mill	Clay

Fleming Island Plantation	Clay
Governors Park South	Clay
Magnolia West	Clay
Middle Village	Clay
Pine Ridge Plantation	Clay
Ridgewood Trails	Clay
Rolling Hills	Clay
Rookery	Clay
Shadowlawn	Clay
South Village	Clay
Two Creeks	Clay
Wilford Preserve	Clay
Collier	
Ave Maria Stewardship	Collier
Big Cypress Stewardship	Collier
Brightshore	Collier
Enbrook CDD	Collier
Fronterra	Collier
Orange Blossom Groves	Collier
Orange Blossom Ranch	Collier
Quarry	Collier
Talis Park	Collier
Tamarindo CDD	Collier
Terreno	Collier
Winding Cypress	Collier
Collier/Lee	
Babcock Ranch	Collier/Lee
Desoto	
Cayman Lakes	Desoto
Duval	
Acree	Duval
Alta Lakes	Duval
Arbors	Duval
Bainebridge	Duval
Bartram Springs	Duval
Beach	Duval
Boggy Branch	Duval
Cedar Pointe	Duval
Cope's Landing	Duval
Cypress Bluff	Duval
Darby	Duval
District	Duval

Ryals Creek	Duval
Kings Creek I	Duval
Seaton Creek Reserve	Duval
Trails	Duval
Bartram Park	Duval
Duval and St. Johns	
Tolomato	Duval and St. Johns
Flagler	
Palm Coast 145	Flagler
Radiance CDD	Flagler
Seminole Palms CDD	Flagler
Tomoka	Flagler
Deer Run	Flagler
Glades	
Lakefront Estates	Glades
Hernando	
Benton Hills CDD	Hernando
Cabot Citrus Farms	Hernando
Caldera	Hernando
Springside	Hernando
Hillsborough	
Belmont	Hillsborough
Belmont II	Hillsborough
Boyette Park	Hillsborough
Encore	Hillsborough
KBar Ranch III	Hillsborough
Magnolia Park	Hillsborough
Mangrove Point & Mangrove Manor CDD	Hillsborough
MTERC	Hillsborough
Simmons Village North	Hillsborough
South Shore Corporate Park Industrial	Hillsborough
Spring Lake	Hillsborough
Stonebrier	Hillsborough
Triple Creek	Hillsborough
Varrea North	Hillsborough
Varrea South CDD	Hillsborough
Villages of Bloomingdale	Hillsborough
Water Street Tampa Improvement	Hillsborough
Waterset South	Hillsborough
Wynnmere West	Hillsborough
Indian River	
Fellsmere Water Control District	Indian River

LP CDD	Indian River
Lake	
Arbor Park Phase 1	Lake
Avalon Groves CDD	Lake
Bellaviva at Whispering Hills	Lake
County Road 33	Lake
Cresswind Lake Harris CDD	Lake
Cypress Reserve	Lake
Dewey Robbins	Lake
Enclave at Lake Geneva	Lake
Esplanade at McKinnon Groves	Lake
Estates at Cherry Lake	Lake
Founders Ridge	Lake
Hammock Oaks CDD	Lake
Hicks Ditch	Lake
Lake Emma	Lake
Lake Harris	Lake
Olympus	Lake
Orange Bend	Lake
Parkside Trails	Lake
Sorrento Pines CDD	Lake
Sugarloaf	Lake
Tara Oaks CDD	Lake
Windsor Cay	Lake
Lee	
Arborwood	Lee
Blue Lake	Lee
CC	Lee
CFM	Lee
Coral Bay of Lee County CDD	Lee
Corkscrew Crossing	Lee
Del Webb Oak Creek	Lee
East Bonita Beach	Lee
Esplanade Lake Club	Lee
Moody River Estates	Lee
Portico	Lee
Saltleaf	Lee
Stonewater CDD	Lee
Verandah East	Lee
Verandah West	Lee
Villagewalk of Bonita Springs	Lee
WildBlue	Lee

Leon	
Capital Region	Leon
Manatee	
Artisan Lakes CDD	Manatee
Artisan Lakes East CDD	Manatee
Aviary at Rutland Ranch CDD	Manatee
Brookstone	Manatee
Coddington CDD	Manatee
Del Webb Sunchase	Manatee
DW BayView CDD	Manatee
Eagle Pointe CDD	Manatee
East River Ranch Stewardship	Manatee
Evergreen	Manatee
Firethorn	Manatee
Heritage Harbour Market Place	Manatee
Lake Flores CDD	Manatee
Mandarin Groves CDD	Manatee
Newport Isles CDD	Manatee
North River Ranch Improvement Stewardship	Manatee
Northlake Stewardship District	Manatee
Paddocks	Manatee
Rye Crossing CDD	Manatee
Rye Ranch CDD	Manatee
Saltmeadows CDD	Manatee
Sanctuary Cove	Manatee
Southpointe of Manatee County	Manatee
Summer Woods CDD	Manatee
Water's Edge	Manatee
Willow Hammock	Manatee
Willows	Manatee
Woodland Preserve	Manatee
Manatee/Sarasota	
Lakewood Ranch Stewardship	Manatee/Sarasota
Marion	
Bellehaven	Marion
Ocala Preserve CDD	Marion
Ridge at Heath Brook CDD	Marion
Winding Oaks	Marion
Martin	
Newfield	Martin
Terra Lago	Martin
Waterside CDD	Martin

Miami-Dade	
Coconut Cay	Miami-Dade
Coronado	Miami-Dade
Parker Pointe	Miami-Dade
Nassau	
Amelia National	Nassau
East Nassau Stewardship	Nassau
Liberty Cove	Nassau
River Glen	Nassau
Three Rivers	Nassau
Okaloosa	
Independence	Okaloosa
Orange	
Boggy Creek	Orange
Falcon Trace	Orange
FRERC	Orange
Golden Gem	Orange
Greeneway	Orange
Grove Resort	Orange
Kelly Park CDD	Orange
Midtown	Orange
Myrtle Creek	Orange
Poitrass East	Orange
Ridge at Apopka CDD	Orange
Riverwalk	Orange
Shingle Creek Transit and Utility	Orange
Urban Orlando	Orange
Westwood/OCC	Orange
Osceola	
Brighton Lakes	Osceola
Buena Lago CDD	Osceola
Center Lake Ranch West CDD	Osceola
Edgewater East	Osceola
Edgewater West	Osceola
Enterprise	Osceola
Everest GMR	Osceola
GIR East	Osceola
Gramercy Farms	Osceola
Ham Brown Reserve CDD	Osceola
Harmony	Osceola
Harmony West CDD	Osceola
Lake Lizzie	Osceola

Live Oak Lake	Osceola
Osceola Chain of Lakes	Osceola
Osceola Village Center	Osceola
Ovation	Osceola
Roan Bridge	Osceola
Sunbridge Stewardship	Osceola
Tapestry	Osceola
Town of Kindred	Osceola
Town of Kindred II	Osceola
Visions at Orlando West	Osceola
Windsor at Westside	Osceola
Palm Beach	
Gulfstream Polo	Palm Beach
Hamal	Palm Beach
Pasco	
Avalon Park West CDD	Pasco
Bexley	Pasco
Bridgewater at Wesley Chapel	Pasco
Deerbrook CDD	Pasco
Del Webb Bexley	Pasco
Del Webb River Reserve	Pasco
Dupree Lakes	Pasco
Estancia at Wiregrass	Pasco
Hidden Creek North	Pasco
Hope Innovation District	Pasco
Long Lake Ranch	Pasco
Palmetto Ridge CDD	Pasco
Parkview at Long Lake Ranch	Pasco
Pasadena Ridge	Pasco
River Landing CDD	Pasco
Riverwood Estates	Pasco
Summerstone CDD	Pasco
Towns at Woodsdale	Pasco
TSR	Pasco
Two Ridges	Pasco
Vida's Way	Pasco
Westwood of Pasco	Pasco
Whispering Pines CDD	Pasco
Wiregrass	Pasco
Wiregrass II	Pasco
Woodcreek CDD	Pasco

Polk	
Clear Springs Stewardship	Polk
Cypress Creek Reserve	Polk
Fox Branch Ranch CDD	Polk
Groves at Lake Marion	Polk
Harmony on Lake Eloise CDD	Polk
Hartford Terrace	Polk
Hawthorne Mill North CDD	Polk
Horseshoe Creek	Polk
Lake Ashton II	Polk
Lowery Hills	Polk
Peace Crossing	Polk
Reserve at Van Oaks CDD	Polk
Sandmine Road	Polk
Silverlake CDD	Polk
Springs at Lake Alfred CDD	Polk
Stuart Crossing CDD	Polk
Polk/Osceola	
Westview South CDD	Polk/Osceola
Santa Rosa	
Parkland	Santa Rosa
Sarasota	
Central Parc	Sarasota
Gracewater Sarasota	Sarasota
Lakeside Plantation	Sarasota
LT Ranch CDD	Sarasota
Myakka Ranch	Sarasota
Sarasota National	Sarasota
Three Rivers Stewardship	Sarasota
West Villages Improvement	Sarasota
Seminole	
Dovera	Seminole
St. Johns	
Aberdeen	St. Johns
Bannon Lakes	St. Johns
Brandy Creek	St. Johns
Bridgewater North	St. Johns
Cordova Palms	St. Johns
DP1	St. Johns
Durbin Crossing	St. Johns
Elevation Pointe	St. Johns
Entrada	St. Johns
Glen St. Johns	St. Johns
Grand Oaks	St. Johns

Greenbriar	St. Johns
Heritage Landing	St. Johns
Heritage Park	St. Johns
Isles of Bartram Park	St. Johns
Longleaf Pine	St. Johns
Madeira	St. Johns
Marshall Creek	St. Johns
Meadow View at Twin Creeks CDD	St. Johns
Parkland Preserve CDD	St. Johns
Sampson Creek	St. Johns
Six Mile Creek	St. Johns
Southaven	St. Johns
St. Augustine Lakes	St. Johns
Stillwater	St. Johns
Trout Creek	St. Johns
World Commerce	St. Johns
Entrada	St. Johns
St. Lucie	
Bedner Farms	St. Lucie
Creekside	St. Lucie
Koa Bay	St. Lucie
LTC Ranch West Residential	St. Lucie
Preserve at Savannah Lakes CDD	St. Lucie
Silver Oaks CDD	St. Lucie
Solaeris CDD	St. Lucie
Sundance	St. Lucie
Sunrise	St. Lucie
Veranda	St. Lucie
Veranda CDD II	St. Lucie
Sumter	
Beaumont CDD	Sumter
Twisted Oaks Pointe CDD	Sumter
Village CDD No. 7	Sumter
Volusia	
Cresswind DeLand	Volusia
Indigo	Volusia
Kepler Road	Volusia
Ormond Crossings West	Volusia
Pioneer	Volusia
Waypointe	Volusia
Walton	
Hammock Bay	Walton
Magnolia Creek	Walton
NatureWalk	Walton

Somerset	Walton
Washington	
Sunny Hills Units 12-15 Dependent District	Washington

Tradition Community Development Districts #1-11

**Financial Report
Fiscal Year 2024/2025
October 1, 2024 - June 30, 2025**

FINANCIAL REPORT
TRADITION COMMUNITY DEVELOPMENT DISTRICT #1-11 RECAP
FISCAL YEAR 2024/2025
OCTOBER 1, 2024 - JUNE 30, 2025

	FISCAL YEAR 2024/2025 FINAL BUDGET	FISCAL YEAR 10/01/24 - 06/30/25 ACTUALS	% Of Budget	COMMENTS
REVENUES				
ON-ROLL ASSESSMENTS - Debt	5,348,340	5,427,854	101%	
ON-ROLL ASSESSMENTS - ADMIN	569,103	570,423	100%	
ON-ROLL ASSESSMENTS - MAINT	2,202,370	2,207,479	100%	
ON-ROLL ASSESSMENTS - TIM	163,587	163,966	100%	
STORMWATER	1,200,000	1,313,364	109%	
OTHER INCOME	60,000	190,108	317%	Includes SG TIM allocation, Interest income, Eng. Rev Fees, etc.
RESERVE FUND TRANSFER	0	0	0%	
Total Revenues	\$ 9,543,400	\$ 9,873,196	103%	
EXPENDITURES - ADMIN				
AUDIT	34,850	0	0%	
DISSEMINATION AGENT	3,000	0	0%	
DISTRICT COUNSEL	50,000	57,751	116%	
MANAGEMENT	150,000	112,500	75%	
ASSESSMENT ROLL	10,000	0	0%	
DUES, LICENSES & FEES	1,925	1,925	100%	Paid for year
ENGINEERING	70,000	59,714	85%	
GENERAL INSURANCE	136,650	130,707	96%	Paid for year
WEB SITE MAINTENANCE	8,250	6,125	74%	
LEGAL ADVERTISING	2,000	1,469	73%	
MISCELLANEOUS	2,000	5	0%	
TRAVEL AND PER DIEM	400	281	70%	
OFFICE SUPPLIES	5,000	4,402	88%	
POSTAGE & SHIPPING	500	890	178%	
COPIES	3,000	0	0%	
SUPERVISOR FEES	60,000	28,823	48%	
TRUSTEE SERVICES	18,000	12,416	69%	
OFFICE RENT	25,000	71,080	284%	Includes SG allocation which is offset by billing SG. Reflected in Other Income Revenue
CONTINUING DISCLOSURE FEE	3,000	3,000	100%	
TOTAL ADMIN EXPENSES	583,575	491,087		
EXPENDITURES - MAINT				
LAKE MAINTENANCE	310,000	184,701	60%	
TIM OPERATIONS	150,500	421,291	280%	Includes SG allocation which is offset by billing SG. Reflected in Other Income Revenue
BUILDING, BRIDGE, MONUMENT MAINTENANCE	10,000	0	0%	
(FKA CONTINGENCY) - MAINT RESERVES	100,000	0	0%	
COMMUNITY AREA MAINTENANCE	140,000	319,791	228%	Includes wet checks, truck, ebikes, bridge work, etc
DEVELOPMENT COORDINATOR	32,410	24,308	75%	
ELECTRIC	110,000	43,352	39%	
ENGINEERING	130,000	110,897	85%	
FIELD MANAGEMENT	247,200	185,400	75%	
FOUNTAIN MAINTENANCE & CHEMICALS	5,000	0	0%	
LANDSCAPING MAINTENANCE & MATERIALS	1,036,285	686,725	66%	
IRRIGATION	167,000	125,745	75%	
IRRIGATION PARTS & REPAIRS	75,000	16,868	22%	
SIDEWALK CLEANING	30,000	22,500	75%	
SIDEWALK REPAIR	60,000	0	0%	
SIGNAGE	10,000	52,394	524%	
STREETLIGHTS	60,000	85,503	143%	
STORMWATER MANAGEMENT	503,285	79,828	16%	
TREE/PLANT REPLACEMENT & TRIM	200,000	0	0%	
TOTAL MAINTENANCE EXPENSES	3,376,681	2,359,303	70%	
Total Expenditures	\$ 3,960,256	\$ 2,850,390	72%	
EXCESS / (SHORTFALL)	\$ 5,583,145	\$ 7,022,806	126%	
PAYMENT TO TRUSTEE	(4,920,473)	(5,130,461)	104%	
BALANCE	\$ 662,672	\$ 1,892,344		
COUNTY APPRAISER & TAX COLLECTOR FEE	(331,336)	(325,339)	98%	
DISCOUNTS FOR EARLY PAYMENTS	(331,336)	(301,753)	91%	
NET EXCESS / (SHORTFALL)	\$ -	\$ 1,265,252		

Tradition CDD No. 1
Balance Sheet
As of June 30, 2025

	<u>Jun 30, 25</u>
ASSETS	
Current Assets	
Checking/Savings	
01-1000 · Valley National 1157	3,144,174.37
Total Checking/Savings	3,144,174.37
Accounts Receivable	
11000 · Accounts Receivable	1,425,342.04
Total Accounts Receivable	1,425,342.04
Other Current Assets	
01-1208 · Due From Other Gov Units - Open	999.78
01-8154 · Deposits	200.00
Total Other Current Assets	1,199.78
Total Current Assets	4,570,716.19
Other Assets	
01-8122 · A/R St Lucie County Excess Fees	-18,711.00
Total Other Assets	-18,711.00
TOTAL ASSETS	<u>4,552,005.19</u>
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
01-2020 · Accounts Payable	492,932.17
Total Accounts Payable	492,932.17
Other Current Liabilities	
01-2023 · Due To Other Funds	396,051.84
01-2025 · Deposits - Engr Deposit	36,142.33
01-2026 · Deposits - Lake Bank Restoratio	535,941.27
01-2030 · Due to CDD2	-33,014.92
01-2031 · Due to CDD3	-34,702.35
01-2032 · Due to CDD4	-39,805.44
01-2033 · Due to CDD5	-39,267.23
01-2034 · Due to CDD6	-38,673.59
01-2035 · Due to CDD7	950.00
01-2036 · Due to CDD8	-23,477.34
01-2037 · Due to CDD9	-14,072.00
01-2038 · Due to CDD10	20,507.92
01-2039 · Due to CDD11	-24,976.07
01-3010 · General Reserve - Signage	500,000.00
01-3020 · General Maintenance Reserves	169,000.00
Total Other Current Liabilities	1,410,604.42
Total Current Liabilities	1,903,536.59
Total Liabilities	1,903,536.59
Equity	
30000 · Opening Balance Equity	203,755.31
99-9999 · Retained Earnings	1,179,461.58
Net Income	1,265,251.71
Total Equity	2,648,468.60
TOTAL LIABILITIES & EQUITY	<u>4,552,005.19</u>

FINANCIAL REPORT
TRADITION COMMUNITY DEVELOPMENT DISTRICT IRRIGATION
FISCAL YEAR 2024/2025
OCTOBER 1, 2024 - JUNE 30, 2025

	FISCAL YEAR 2024/2025 FINAL BUDGET	FISCAL YEAR 10/01/24 - 06/30/25 ACTUALS	% Of Budget
REVENUES			
SERVICE CHARGE - IRRIGATION	1,890,000	1,512,347	80%
ENGINEERING REVENUE FEES/OTHER	17,338	46,604	269%
Total Revenues	\$ 1,907,338	\$ 1,558,951	349%
EXPENSES			
TRUSTEE SERVICES	5,000	0	0%
MANAGEMENT	389,076	291,807	75%
ENGINEERING	40,000	70,986	177%
PROFESSIONAL SERVICES, OTHER	5,000	0	0%
DEVELOPMENT COORDINATOR	64,821	48,616	75%
CITY FRANCHISE FEE	165,000	99,943	61%
TRAVEL AND PER DIEM	400	59	15%
TELEPHONE	1,930	0	0%
POSTAGE AND SHIPPING	253	113	45%
BANK FEES	1,250	0	0%
BAD DEBT	65,000	0	0%
OFFICE SUPPLIES	250	360	144%
FIELD SUPPLIES (OTHER)	2,000	0	0%
DUES, LICENSES, FEES	2,300	0	0%
VEHICLE, GAS, & REPAIR	1,000	0	0%
ELECTRIC	105,000	99,841	95%
WATER	170	234	137%
OTHER UTILITIES	1,550	0	0%
GENERAL INSURANCE	21,102	0	0%
GENERAL REPAIR & MAINTENANCE	215,000	113,973	53%
LANDSCAPING MAINTENANCE & MATERIAL	11,000	0	0%
HVAC	4,500	0	0%
RENEWAL AND REPLACEMENT	250,000	0	0%
OTHER SYSTEM IMPROVEMENTS	100,000	65,885	66%
OPERATING RESERVES/MISC	80,000	0	0%
CONTINGENCY	7,411	0	0%
Total Expenses	\$ 1,539,013	\$ 791,816	51%
EXCESS / (SHORTFALL)	\$ 368,325	\$ 767,135	208%
PAYMENT TO TRUSTEE	(368,325)	(276,694)	75%
BALANCE	\$ 0	\$ 490,441	
NET INCOME	\$ 0	\$ 490,441	

Tradition Irrigation

Balance Sheet

As of June 30, 2025

	Jun 30, 25
ASSETS	
Current Assets	
Checking/Savings	
01-1001 · Valley National #4703	
01-1002 · Valley Natl #4307 - Capacity	35,872.57
01-1001 · Valley National #4703 - Other	2,073,961.54
Total 01-1001 · Valley National #4703	2,109,834.11
Total Checking/Savings	2,109,834.11
Accounts Receivable	
01-1200 · Accounts Receivable	66,276.73
Total Accounts Receivable	66,276.73
Other Current Assets	
01-2023 · Due From Other Funds	17,900.21
Total Other Current Assets	17,900.21
Total Current Assets	2,194,011.05
Fixed Assets	
01-2030 · Equipment and Furniture	23,957.00
Total Fixed Assets	23,957.00
Other Assets	
01-2025 · Deposits	95.00
01-2035 · Accum Depr - Equipment	-23,955.18
Total Other Assets	-23,860.18
TOTAL ASSETS	2,194,107.87
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
01-2020 · Accounts Payable	69,325.88
Total Accounts Payable	69,325.88
Other Current Liabilities	
01-2026 · Deposits - Security Deposit	1,390.22
01-2027 · Deferred Revenue	10,000.00
01-2190 · Cash Exchange	-11,857.11
Total Other Current Liabilities	-466.89
Total Current Liabilities	68,858.99
Long Term Liabilities	
11-2180 · Note Payable	93,787.00
Total Long Term Liabilities	93,787.00
Total Liabilities	162,645.99
Equity	
30000 · Net Assets - 270	-87,351.52
99-9999 · Retained Earnings	1,628,372.64
Net Income	490,440.76
Total Equity	2,031,461.88
TOTAL LIABILITIES & EQUITY	2,194,107.87

**Tradition Irrigation
A/R Aging Summary
As of June 30, 2025**

	Current	1 - 30	31 - 60	61 - 90	> 90	TOTAL
706800 Wells Fargo	0.00	0.00	0.00	0.00	32.70	32.70
Aycock at Tradition	0.00	204.13	204.13	0.00	0.00	408.26
Brennity at Tradition	0.00	3,051.97	0.00	0.00	0.00	3,051.97
Chesterbrook Academy	0.00	134.37	0.00	0.00	0.00	134.37
Christ Fellowship Church	0.00	1,646.88	0.00	0.00	0.00	1,646.88
Cleveland Clinic Florida	0.00	443.92	0.00	0.00	0.00	443.92
Cleveland Clinic Martin Health -Tradition	0.00	64.80	64.80	64.80	194.40	388.80
Culver's - G&S Family Hospitality Svcs	0.00	1.00	0.00	0.00	0.00	1.00
Del Webb at Tradition Homeowners Assoc	0.00	3,519.15	0.00	0.00	0.00	3,519.15
Grande Palms at Tradition I & II	0.00	879.92	0.00	0.00	0.00	879.92
Grande Palms at Tradition III	0.00	1,708.31	0.00	0.00	0.00	1,708.31
Heartland Dental	0.00	31.71	31.71	31.71	0.00	95.13
Heritage Oaks	0.00	0.00	0.00	0.00	0.00	0.00
Heritage Oaks at Tradition HOA	0.00	11,857.11	0.00	0.00	0.00	11,857.11
Heron Preserves	0.00	0.00	0.00	0.00	795.22	795.22
Hilton - Homewood Suites, PSL	0.00	346.82	0.00	0.00	0.00	346.82
Innovo Development Group, LLC	0.00	188.27	0.00	0.00	188.27	376.54
Manderlie at Tradition	0.00	5,080.34	0.00	0.00	0.00	5,080.34
Martin Health System	0.00	921.54	921.54	921.54	2,764.62	5,529.24
Panaderias, LLC	0.00	97.11	0.00	0.00	0.00	97.11
Panda Restaurant Group Inc	0.00	57.27	52.27	0.00	5.00	114.54
Pegasus PSL, Ltd	0.00	283.40	0.00	0.00	0.00	283.40
PRIME STORAGE TRADITIONS, LLC	0.00	182.33	0.00	0.00	0.00	182.33
PSL Hospitality, LLP	0.00	253.87	0.00	0.00	0.00	253.87
Recovery Sports Grill	0.00	75.31	0.00	0.00	0.01	75.32
Seven Restaurants, LLC	0.00	89.18	89.18	89.18	1,426.88	1,694.42
SG Mini Golf	0.00	0.00	0.00	0.00	158.54	158.54
Springs at Tradition	0.00	1,789.57	1,789.57	1,789.57	5,368.71	10,737.42
St Lucie County Fire Dept.	0.00	223.94	0.00	0.00	0.00	223.94
The Lucie at Tradition	0.00	1,089.99	0.00	0.00	0.00	1,089.99
Tradition CDD #1	0.00	13,971.69	0.00	0.00	0.00	13,971.69
Tradition POA	0.00	229.89	0.00	0.00	0.00	229.89
Victoria Parc	0.00	0.00	0.00	0.00	297.64	297.64
Victoria Parc 2	0.00	0.00	0.00	0.00	184.10	184.10
Victoria Parc BTR, LLC - POD C	0.00	0.00	0.00	0.00	506.95	506.95
Westcliffe Estates HOA	0.00	-120.10	0.00	0.00	0.00	-120.10
TOTAL	0.00	48,303.69	3,153.20	2,896.80	11,923.04	66,276.73