



**TREE ISLAND ESTATES
COMMUNITY DEVELOPMENT
DISTRICT**

**MIAMI-DADE COUNTY
REGULAR BOARD MEETING
MARCH 28, 2023
6:00 P.M.**

Special District Services, Inc.
8785 SW 165th Avenue, Suite 200
Miami, FL 33193

www.treeislandestatescdd.org

786.303.3661 Telephone
877.SDS.4922 Toll Free
561.630.4923 Facsimile

AGENDA
TREE ISLAND ESTATES COMMUNITY DEVELOPMENT DISTRICT
Kendall Executive Center
8785 SW 165th Avenue, Suite 200
Miami, Florida 33193
REGULAR BOARD MEETING
March 28, 2023
6:00 p.m.

- A. Call to Order
- B. Proof of Publication.....Page 1
- C. Establish Quorum
- D. Additions or Deletions to Agenda
- E. Comments from the Public for Items Not on the Agenda
- F. Approval of Minutes
 - 1. October 25, 2022 Regular Board Meeting Minutes.....Page 2
- G. Old Business
 - 1. Staff Report
- H. New Business
 - 1. Consider Resolution No. 2023-01 – Adopting a Fiscal Year 2023/2024 Proposed Budget.....Page 4
 - 2. Discussion Regarding Potential Security Services for the Community.....Page 11
 - 3. Consider Adjustment to District Counsel Fee Structure.....Page 26
 - 4. Consider Adjustment to District Engineer Fee Structure.....Page 28
- I. Administrative Matters
- J. Additional Board Member/Staff Comments and Requests
- K. Adjourn

MIAMI-DADE

STATE OF FLORIDA
COUNTY OF MIAMI-DADE:

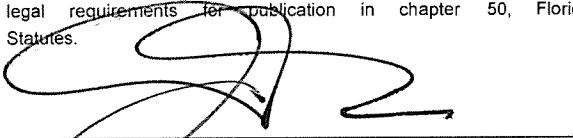
Before the undersigned authority personally appeared MARIA MESA, who on oath says that he or she is the LEGAL CLERK, Legal Notices of the Miami Daily Business Review f/k/ a Miami Review, a daily (except Saturday, Sunday and Legal Holidays) newspaper, published at Miami in Miami-Dade County, Florida; that the attached copy of advertisement, being a Legal Advertisement of Notice in the matter of

TREE ISLAND ESTATES COMMUNITY DEVELOPMENT DISTRICT - FISCAL YEAR 2022/2023 REGULAR MEETING SCHEDULE

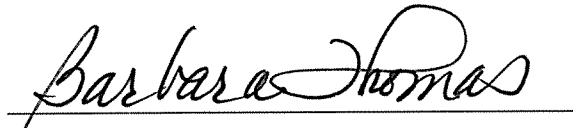
in the XXXX Court, was published in said newspaper by print in the issues of and/or by publication on the newspaper's website, if authorized, on

10/17/2022

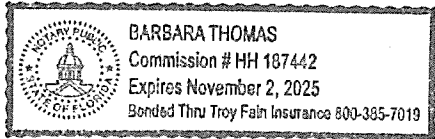
Affiant further says that the newspaper complies with all legal requirements for publication in chapter 50, Florida Statutes.



Sworn to and subscribed before me this 17 day of OCTOBER, A.D. 2022



(SEAL)
MARIA MESA personally known to me



TREE ISLAND ESTATES COMMUNITY DEVELOPMENT DISTRICT FISCAL YEAR 2022/2023 REGULAR MEETING SCHEDULE

NOTICE IS HEREBY GIVEN that the Board of Supervisors (the "Board") of the Tree Island Estates Community Development District (the "District") will hold Regular Meetings in the conference room at the Kendall Executive Center located at 8785 SW 165th Avenue, Suite 200, Miami, Florida 33193 at 6:00 p.m., on the following dates:

- October 25, 2022
- November 22, 2022
- March 28, 2023
- April 25, 2023
- May 23, 2023
- June 27, 2023
- July 25, 2023
- August 22, 2023

The purpose of the meetings is for the Board to consider any District business which may lawfully and properly come before the Board. The meetings are open to the public and will be conducted in accordance with the provisions of Florida law for community development districts. Copies of the Agendas for any of the meetings may be obtained from the District's website or by contacting the District Manager at 786-313-3661 and/or toll free at 1-877-737-4922, prior to date of the particular meeting.

From time to time one or two Board members may participate by telephone; therefore, a speaker telephone will be present at the meeting location so that Board members may be fully informed of the discussion taking place. Said meeting(s) may be continued as found necessary to a time and place specified on the record.

If any person decides to appeal any decision made with respect to any matter considered at these meetings, such person will need a record of the proceedings and such person may need to insure that a verbatim record of the proceedings is made at his or her own expense and which record includes the testimony and evidence on which the appeal is based.

In accordance with the provisions of the Americans with Disabilities Act, any person requiring special accommodations or an interpreter to participate at any of these meetings should contact the District Manager at 786-313-3661 and/or toll free at 1-877-737-4922 at least seven (7) days prior to the date of the particular meeting.

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

TREE ISLAND ESTATES COMMUNITY DEVELOPMENT DISTRICT

www.treeislandstatescdd.org
10/17

22-42/0000625752M

**TREE ISLAND ESTATES COMMUNITY DEVELOPMENT DISTRICT
REGULAR BOARD MEETING
OCTOBER 25, 2022**

A. CALL TO ORDER

The October 25, 2022, Regular Board Meeting of the Tree Island Estates Community Development District (the “District”) was called to order at 6:10 p.m. in the meeting room at the Kendall Executive Office located at 8785 SW 165th Avenue, Suite 200, Miami, Florida 33193.

B. PROOF OF PUBLICATION

Proof of publication was presented that notice of the Regular Board Meeting had been published in the *Miami Daily Business Review* on October 17, 2022, as part of the District’s Fiscal Year 2022/2023 Meeting Schedule, as legally required.

C. ESTABLISH A QUORUM

It was determined that the attendance of Chairperson Luis Delrio, Vice Chairperson Monica Suarez and Supervisors Oremia Delrio and Donville Morisson constituted a quorum and it was in order to proceed with the meeting.

Staff in attendance included: District Managers Armando Silva and Gloria Perez of Special District Services, Inc.; and General Counsel Ginger Wald of Billing, Cochran, Lyles, Mauro & Ramsey, P.A.

D. ADDITIONS OR DELETIONS TO THE AGENDA

There were no additions or deletions to the agenda.

E. COMMENTS FROM THE PUBLIC FOR ITEMS NOT ON THE AGENDA

There were no comments from the public for items not on the agenda.

F. APPROVAL OF MINUTES

1. August 23, 2022, Regular Board Meeting & Public Hearing

The minutes of the **August 23, 2022, Regular Board Meeting & Public Hearing** were presented for approval.

A MOTION was made by Mr. Delrio, seconded by Ms. Suarez and unanimously passed approving the minutes of the August 23, 2022, Regular Board Meeting & Public Hearing , as presented.

G. OLD BUSINESS

1. Staff Report

There was no old business to report at the moment.

H. NEW BUSINESS

1. Consider Resolution No. 2022-05 – Adopting a Fiscal Year 2021/2022 Amended Budget

Mr. Silva presented Resolution No. 2022-05, entitled:

RESOLUTION NO. 2022-05

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE TREE ISLAND ESTATES COMMUNITY DEVELOPMENT DISTRICT AUTHORIZING AND ADOPTING AN AMENDED FINAL FISCAL YEAR 2021/2022 BUDGET (“AMENDED BUDGET”), PURSUANT TO CHAPTER 189, FLORIDA STATUTES; AND PROVIDING AN EFFECTIVE DATE.

Mr. Silva explained, as is done every year for administrative and statutory requirements, within 60 days of any given fiscal year end, the Board adopts a revised/amended budget for said year. The fiscal year ended on September 30, 2022. This is the reason it is administrative in nature (past year’s budget for past year’s expenses) and will serve as the Board’s final approval/ratification of the District’s expenditures for the past fiscal year.

A **MOTION** was made by Mr. Morrison, seconded by Mr. Delrio and unanimously passed adopting Resolution No. 2022-05, adopting and approving the Amended Fiscal Year 2021/2022 Budget, as presented.

I. ADMINISTRATIVE MATTERS

1. Financial Report

Mr. Silva presented the Financial Reports through September 2021, and the Assessment Collections, which were provided in the meeting booklet. He indicated that available funds as of September 30, 2022, were \$187,918.15.

J. ADDITIONAL BOARD MEMBER/STAFF COMMENTS AND REQUESTS

There were no additional Board Member/Staff comments or requests.

K. ADJOURNMENT

There being no further business to come before the Board, a **MOTION** was made by Mr. Delrio, seconded by Mr. Morrison to adjourn the Regular Board Meeting at 6:19 p.m. There were no objections.

ATTESTED BY:

Secretary/Assistant Secretary

Chairman/Vice-Chair

RESOLUTION NO. 2023-01

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE TREE ISLAND ESTATES COMMUNITY DEVELOPMENT DISTRICT APPROVING A PROPOSED BUDGET AND NON-AD VALOREM SPECIAL ASSESSMENTS FOR FISCAL YEAR 2023/2024; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the Board of Supervisors (“Board”) of the Tree Island Estates Community Development District (“District”) is required by Chapter 190.008, *Florida Statutes*, to approve a Proposed Budget for each fiscal year; and,

WHEREAS, the Proposed Budget including the Assessments for Fiscal Year 2023/2024 has been prepared and considered by the Board.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE TREE ISLAND ESTATES COMMUNITY DEVELOPMENT DISTRICT THAT:

Section 1. The Proposed Budget including the Assessments for Fiscal Year 2023/2024 attached hereto as Exhibit “A” is approved and adopted.

Section 2. A Public Hearing is hereby scheduled for July 25, 2023 at 6:00 p.m. in the Kendall Executive Center, 8785 SW 165th Avenue, Suite 200, Miami, Florida 33193, for the purpose of receiving public comments on the Proposed Fiscal Year 2023/2024 Budget.

PASSED, ADOPTED and EFFECTIVE this 28th day of March, 2023.

ATTEST:

**TREE ISLAND ESTATES
COMMUNITY DEVELOPMENT DISTRICT**

By: _____
Secretary/Assistant Secretary

By: _____
Chairperson/Vice-Chairperson

Tree Island Estates
Community Development District

**Proposed Budget For
Fiscal Year 2023/2024
October 1, 2023 - September 30, 2024**

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- III DETAILED PROPOSED DEBT SERVICE FUND BUDGET
- IV ASSESSMENT COMPARISON

PROPOSED BUDGET
TREE ISLAND ESTATES COMMUNITY DEVELOPMENT DISTRICT
FISCAL YEAR 2023/2024
OCTOBER 1, 2023 - SEPTEMBER 30, 2024

	FISCAL YEAR 2023/2024 BUDGET
REVENUES	
Administrative Assessments	63,361
Maintenance Assessments	57,298
Debt Assessments	124,143
Other Revenues	0
Interest Income	300
TOTAL REVENUES	\$ 245,102
ADMINISTRATIVE EXPENDITURES	
Supervisor Fees	5,000
Employer Taxes - Payroll	400
Management	27,204
Secretarial	3,900
Legal	9,250
Assessment Roll	6,000
Audit Fees	3,900
Insurance	6,900
Legal Advertisements	550
Miscellaneous	1,100
Postage	250
Office Supplies	525
Website	750
Dues & Subscriptions	175
Trustee Fee	3,600
Continuing Disclosure Fee	350
TOTAL ADMINISTRATIVE EXPENDITURES	\$ 69,854
MAINTENANCE EXPENDITURES	
Aquatic Maintenance	3,500
Lawn/Landscape Maintenance	19,000
Preserve Maintenance	16,000
Maintenance Contingency	9,000
Irrigation System Maintenance	2,860
Entrance Feature	1,000
Engineering/Inspections	2,500
TOTAL MAINTENANCE EXPENDITURES	\$ 53,860
TOTAL EXPENDITURES	\$ 123,714
REVENUES LESS EXPENDITURES	\$ 121,388
Bond Payments	(116,694)
Balance	\$ 4,694
County Appraiser & Tax Collector Fee	(4,896)
Discounts For Early Payments	(9,792)
EXCESS/ (SHORTFALL)	\$ (9,994)
Carryover From Prior Year	9,994
NET EXCESS/ (SHORTFALL)	\$ (0)

DETAILED PROPOSED BUDGET
TREE ISLAND ESTATES COMMUNITY DEVELOPMENT DISTRICT
FISCAL YEAR 2023/2024
OCTOBER 1, 2023 - SEPTEMBER 30, 2024

	FISCAL YEAR 2021/2022 ACTUAL	FISCAL YEAR 2022/2023 BUDGET	FISCAL YEAR 2023/2024 BUDGET	COMMENTS
REVENUES				
Administrative Assessments	62,124	66,021	63,361	Expenditures Less Interest & Carryover/.94
Maintenance Assessments	58,893	54,638	57,298	Expenditures /.94
Debt Assessments	124,144	124,143	124,143	Bond Payments/.94
Other Revenues	0	0	0	
Interest Income	251	240	300	Estimated At \$25 Per Month
TOTAL REVENUES	\$ 245,412	\$ 245,042	\$ 245,102	
ADMINISTRATIVE EXPENDITURES				
Supervisor Fees	2,200	5,000	5,000	No Change From 2022/2023 Budget
Employer Taxes - Payroll	168	400	400	Projected At 8% Of Supervisor Fees
Management	25,644	26,412	27,204	CPI Adjustment (Capped At 3%)
Secretarial	3,900	3,900	3,900	No Change From 2022/2023 Budget
Legal	6,160	9,250	9,250	No Change From 2022/2023 Budget
Assessment Roll	6,000	6,000	6,000	No Change From 2022/2023 Budget
Audit Fees	3,700	3,800	3,900	\$100 Increase From 2022/2023 Budget
Insurance	5,815	6,200	6,900	Fiscal Year 2022/2023 Expenditure Was \$6,493
Legal Advertisements	530	550	550	No Change From 2022/2023 Budget
Miscellaneous	629	1,200	1,100	\$100 Decrease From 2022/2023 Budget
Postage	125	250	250	No Change From 2022/2023 Budget
Office Supplies	249	550	525	\$25 Decrease From 2022/2023 Budget
Website	750	750	750	No Change From 2022/2023 Budget
Dues & Subscriptions	175	175	175	No Change From 2022/2023 Budget
Trustee Fee	3,548	3,600	3,600	No Change From 2022/2023 Budget
Continuing Disclosure Fee	350	350	350	No Change From 2022/2023 Budget
TOTAL ADMINISTRATIVE EXPENDITURES	\$ 59,943	\$ 68,387	\$ 69,854	
MAINTENANCE EXPENDITURES				
Aquatic Maintenance	2,788	3,500	3,500	No Change From 2022/2023 Budget
Lawn/Landscape Maintenance	22,592	17,000	19,000	\$2,000 Increase From 2022/2023 Budget
Preserve Maintenance	15,812	16,000	16,000	No Change From 2022/2023 Budget
Maintenance Contingency	11,465	9,000	9,000	Maintenance Contingency
Irrigation System Maintenance	0	2,860	2,860	No Change From 2022/2023 Budget
Entrance Feature	3,400	1,000	1,000	Entrance Feature
Engineering/Inspections	1,975	2,000	2,500	\$500 Increase From 2022/2023 Budget
TOTAL MAINTENANCE EXPENDITURES	\$ 58,032	\$ 51,360	\$ 53,860	
TOTAL EXPENDITURES	\$ 117,975	\$ 119,747	\$ 123,714	
REVENUES LESS EXPENDITURES	\$ 127,437	\$ 125,295	\$ 121,388	
Bond Payments	(118,349)	(116,694)	(116,694)	2024 Principal & Interest Payments
Balance	\$ 9,088	\$ 8,601	\$ 4,694	
County Appraiser & Tax Collector Fee	(2,361)	(4,896)	(4,896)	Two Percent Of Total Assessment Roll
Discounts For Early Payments	(9,071)	(9,792)	(9,792)	Four Percent Of Total Assessment Roll
EXCESS/ (SHORTFALL)	\$ (2,344)	\$ (6,087)	\$ (9,994)	
Carryover From Prior Year	0	6,087	9,994	Carryover From Prior Year
NET EXCESS/ (SHORTFALL)	\$ (2,344)	\$ (0)	\$ (0)	

DETAILED PROPOSED DEBT SERVICE BUDGET

TREE ISLAND ESTATES COMMUNITY DEVELOPMENT DISTRICT

FISCAL YEAR 2023/2024

OCTOBER 1, 2023 - SEPTEMBER 30, 2024

	FISCAL YEAR 2021/2022	FISCAL YEAR 2022/2023	FISCAL YEAR 2023/2024	
REVENUES	ACTUAL	BUDGET	BUDGET	COMMENTS
Interest Income	7	10	100	Projected Interest For 2023/2024
NAV Tax Collection	118,349	116,694	116,694	Maximum Debt Service Collection
Total Revenues	\$ 118,356	\$ 116,704	\$ 116,794	
EXPENDITURES				
Principal Payments	75,000	80,000	80,000	Principal Payment Due In 2024
Interest Payments	38,188	34,450	31,850	Interest Payments Due In 2024
Bond Redemption	0	2,254	4,944	Estimated Excess Debt Collections
Total Expenditures	\$ 113,188	\$ 116,704	\$ 116,794	
Excess/ (Shortfall)	\$ 5,168	\$ -	\$ -	

Series 2014 Bond Refunding Information

Original Par Amount =	\$1,680,000	Annual Principal Payments Due:	May 1st
Interest Rate=	3.25%*	Annual Interest Payments Due :	May 1st & November 1st
Issue Date:	May 2014		
Maturity Date:	May 2034		

* Rate Is adjustable After Ten Years

Par Amount As Of 1/1/23 = \$1,100,000

Tree Island Estates CDD Assessment Comparison

	Fiscal Year 2020/2021 Assessment <u>Before Discount*</u>	Fiscal Year 2021/2022 Assessment <u>Before Discount*</u>	Fiscal Year 2022/2023 Assessment <u>Before Discount*</u>	Fiscal Year 2023/2024 Projected Assessment <u>Before Discount*</u>
Administrative	\$ 225.43	\$ 225.43	\$ 240.95	\$ 231.25
Maintenance	\$ 214.94	\$ 214.94	\$ 199.42	\$ 209.12
<u>Debt</u>	<u>\$ 453.08</u>	<u>\$ 453.08</u>	<u>\$ 453.08</u>	<u>\$ 453.08</u>
Total	\$ 893.45	\$ 893.45	\$ 893.45	\$ 893.45

* Assessments Include the Following :

- 4% Discount for Early Payments
- 1% County Tax Collector Fee
- 1% County Property Appraiser Fee

Community Information:

Total Units 274



13595 SW 134th Ave, Suite #211
Miami, FL 33193
Ph: 305-635-6200

Proposal especially prepared for:

**Tree Island
Community Development District
8785 SW 165th Ave. Ste #200
Miami, FL 33193**

Proposal Date: February 14, 2023





February 14, 2023

Mr. Armando Silva
Property Manager
Tree Island CDD
8785 SW 165th Ave. Ste #200
Miami, FL 33193

Re: Proposal for security guard services at Tree Island Community Development District.

Dear Mr. Silva:

Thanks for your interest in our company as a potential provider of Security Guard Services. Honesty, transparency and complete customer satisfaction are top priorities in our company, and it all starts from the moment we receive your first inquiry for information about our services.

Our personalized customer service is unsurpassed in this industry. Unlike large national and regional companies that are often burdened by corporate bureaucracies, our team is extremely nimble, responsive to customers' needs and can quickly customize services to accommodate what works best for each client.

After reviewing the scope of services described for your community, we are pleased to inform you that our company is extremely qualified to provide the high-quality services that Tree Island Community Development District residents expect and deserve.

We understand the difficulty that property managers and association board members face when deciding which security guard company would be a good fit and worthy partner for their community. We offer the following information for your consideration when making this important decision.

- Our company was founded in 2007 and currently employs over 400 armed and unarmed security officers, front desk ambassadors and access control officers. In the private sector, we have extensive experience providing security and front desk ambassador services to luxury condominiums, residential communities, clubhouses, commercial office buildings, construction sites, industrial properties, distribution centers, financial institutions, shopping malls and industrial parks, among others. We are proud to mention that our first corporate client, a Fortune 500 company, hired us for the first time in January 2008 and they are still one of our very satisfied clients today.

In the public sector, we provide services under government contracts at Miami International and Opa-Locka airports, Miami Dade County courthouses, Miami Dade County parks and marinas, Tax Collector's Office, Victims Advocacy Center at the State Attorney's Office, Abused Women's Center, Water and Sewer pump stations and buildings, public libraries, Miami Dade Transit and other county buildings and facilities.

- Our management team and security officers assigned to Tree Island Community Development District will be trained to provide personalized courteous services to all residents, visitors and vendors to the district. We treat homeowners, visitors, employees and vendors with the respect, courtesy and consideration they expect and deserve. Our team will work closely with the property manager in a seamless partnership.
- Our top priority is excellent customer service and customer satisfaction. Although our management team works hard to avoid issues of concern, when we identify them or they are brought to our attention, they are always corrected promptly and to the customer's satisfaction.
- When we begin servicing your property, we will handle all pertinent security related issues as described in the post orders and report to you in digital format directly to your computer or smart phone, unless an extreme emergency occurs that requires your immediate personal notification after hours.
- Our customer service training was specifically developed for our company by experts in training programs designed for the hospitality industry and include guidance in the following areas:
 - a) Maintain an attitude of service excellence
 - b) Identify customer needs
 - c) Use customer friendly body language and words
 - d) Practice excellent service at every customer contact point
 - e) Handle difficult residents or visitors with care and compassion
 - f) Exceed customers' expectations
- We utilize a state-of-the-art GPS enabled system to monitor our officers' performance and streamline communications with management. The online management reporting system allows property managers timely access to reports and issues of concern, including parking enforcement, maintenance and safety issues. These reports may include photos that are available 24/7 from any device connected to the Internet.
- We emphasize physical appearance and personal hygiene; our security officers and front desk ambassadors must maintain strict grooming standards and report to work in clean and neatly pressed attire. Our employees are not allowed to have unkempt facial hair, unconventional hair styles or exposed body piercings that would not be suitable for the workplace. Tattoos that could be considered offensive must be covered.
- All the employees assigned to Tree Island Community Development District will undergo background checks, which include, but are not necessarily limited to the following:
 - a) Employment application review and verification -
 - b) Interview and evaluation to determine basic abilities for the position and suitability (right fit) for the post.
 - c) Background check – criminal, sexual predator, and others as described below.
 - d) Pre-employment and random drug testing.

All licensed security officers must submit their fingerprints and photographs to the state and undergo a national criminal history check conducted by the Florida Department of Law Enforcement and the Federal Bureau of Investigations (FBI). Most applicants who have criminal convictions that disqualifies them for the security officer's license are identified during this process.

Our company also conducts additional criminal checks that may include:

- a) FDLE criminal history check (not applicable if state license recently issued)
- b) Local county criminal and civil violations check
- c) Nationwide search of the sexual predator and sex offender's database.
- d) Status of applicant's driver's license and driving history, if applicable.

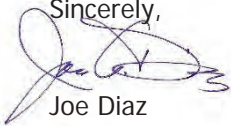
- e) Status of applicant's security officer's licenses with the Division of Licensing
- f) Prior employment check.

I am enclosing for your review and consideration, a proposal and recommended budgets for the services and specific positions you requested. Keep in mind that hourly bill rates and hourly pay rates are closely related and affect one another, as well as the quality of the officers that can be assigned to your community.

Our company does not earn a greater profit margin when bill rates are higher because the additional funds are used to increase the hourly pay for the officers assigned to your property, which allows us to hire and retain better qualified personnel.

We pride ourselves in being extremely transparent in the pricing process and welcome any questions you may have. We thank you for your consideration and the opportunity to submit this proposal and we look forward to becoming your preferred provider of security services very soon.

Sincerely,

A handwritten signature in blue ink, appearing to read "Joe Diaz", is written over a circular stamp or watermark.

Joe Diaz
President



Proposal to provide the following services at:

Tree Island Community Development District

Unarmed Security Guard Services

“Honesty, transparency and excellent customer service”

Our approach to security guard services combines our experience in law enforcement with many years of servicing clients in the private and public sector. We strongly believe in customer service and hospitality training because years of experience in the private security industry have taught us that customer service and people skills are what security officers must rely on to effectively do their jobs the great majority of the time.

The residents and visitors at Tree Island Community Development District expect and deserve a superior level of service that we are extremely qualified to deliver. It is that commitment to excellence that prompted us to commission an independent company specializing in customer service training for the hospitality industry and major corporations to develop an exclusive customer service and hospitality training program for our security officers and front desk ambassadors.

To complement our exclusive customer service and hospitality training, we emphasize and strictly enforce, proper uniform wear, grooming standards and personal hygiene, all of which are critical to making a first impression and gaining the respect of the people that our personnel must interact with during their tour of duty.

Personnel at Tree Island Community Development District will receive the following training:

- Delta Five Security customer service training
- Life safety systems and water damage mitigation procedures
- Emergency evacuation
- Community rules, policies and procedures
- Access control and screening procedures (if applicable)
- Uniform, physical appearance and hygiene policies
- Post orders and other management directives
- Ways to assist property management and maintenance (lighting reports / violations)
- Identification and timely reporting of safety hazards
- Parking violations and vehicle towing (if applicable)

All Delta Five Security personnel assigned to work Tree Island Community Development District will receive training that will enable them to efficiently handle emergency situations as well as simple requests for service from residents or visitors. An account manager will be assigned to your account and will serve as liaison with your office.

Customer Service and Hospitality Training unique to Delta Five Security -

The Delta Five Customer Service and Hospitality Training was developed for our agency by a group of experts that specialize in training programs for major hotel chains, large hospitals, financial institutions, major corporations and some federal government agencies. The training program includes:

- Attitude of excellent service
- Identifying customer needs
- Thoughtful Body Language and Words
- Uncompromising service at every contact point
- Resolving conflict
- Exceeding customer expectations

Quality Control Program:

In order to ensure that we consistently deliver the highest quality of service to our clients, our company maintains a quality control program that monitors the job performance of guards and the clients' level of satisfaction with our services.

Daily, our security officers on-duty activities and reports are reviewed by supervisors and/or our customer service specialists to make sure that they are complying with the required tasks according to post orders.

On a bi-weekly basis, clients are contacted by a manager or customer service specialist via email, phone call or personal visit to check on how satisfied they are with services and to discuss any pertinent issues. At any time, clients can contact management about special needs, modifications to usual tasks, upcoming details, events, etc.

Delta Five Security GPS enabled guard management and reporting system:

We streamline communications with the use of an online management and reporting system that allows property managers access to pertinent information and reports from their smart phones, tablets or computers 24 hours a day.

Officers can submit timely reports of maintenance issues and route work orders to the appropriate department for immediate action with complete oversight from property managers, but without the burdensome paper trail normally associated with these tasks.

Our system always allows us to monitor security officers' job performance and includes a GPS equipped guard touring system. The system captures the officers' arrival on site, their tour of duty, sign off times and saves those reports in real time.

Delta Five Security Residential Community Special Services

Community policing – Our company creates a partnership with residents and maintains open lines of communication with the community. Security Officers / Ambassadors are trained to become familiar with the neighborhood and proficient at detecting unusual or suspicious activities. A phone will be deployed at the post and security officers will pass out business cards urging residents to report any suspicious persons or activities and safety hazards.

This is a sample of the on-duty guards business card issued to residents:



Watch orders – Residents let us know when they will be away on vacation or business and we monitor any unusual activity around the home several times during each shift. We will notify the police and immediately call the emergency contact numbers provided by the homeowner if any suspicious activity is noted. (Service depends on manpower allocation at the property and may not be available to all clients)

Personal safety escorts to your residence if you are arriving late at night.

Perimeter inspections - Our officers will conduct a perimeter inspection of your home and the surrounding areas if you have been the subject of threats or have reason to believe that someone may be waiting to harm you upon your return home.

Burglar Alarms – We will conduct a loose perimeter check of a home if a burglar alarm goes off and the alarm monitoring service notifies the owner who must then notify our security officer on duty. We will contact police if anything looks disturbed or if any suspicious vehicles or persons are observed. Safety of our employees, responding police officers and/or residents is our top priority. For this reason, our unarmed security officers will be instructed to keep a safe distance when checking alarms

or other in progress crimes. They will also be instructed to refrain from any attempts to apprehend suspects and to limit their role to the industry norm to observe and report. For in progress crimes, our personnel will be trained to call 911 and provide them with as much information as they can possible gather from a safe distance. We cannot accept calls directly from an alarm monitoring service, but homeowners can contact us at the post phone after receiving notification from the alarm company. This is a courtesy service only and residents should not refrain from requesting police response to alarm notifications. (Subject to manpower availability and other limitations)

Reporting Violations and Safety Hazards - Our security officers monitor the community for safety hazards, lights that are not working and for violations of community association rules and regulations. We report this to the property management on specially designed reports sent via e-mail and on weekly reports. We include photos of the violations we send to management.

Door Hangers Notifications - Our security officers utilize door hanger tags in situations where we want to alert a home owner of activity that may have taken place or things that may need their attention while they are away. For example, if we spotted an unsecured door, suspicious persons or activity, etc.

Here is a sample of the tag:

Date: _____ Time: _____
Address: _____

We came by while you were out

Alarm: Home ___ Vehicle ___
 Open door/window
 Unsecured property
 Suspicious vehicle/person
 Other: _____

Remarks: _____

Officer's name: _____
Phone number: _____

Your Delta Five Security team
"Providing security and improving the quality
of life of those we are honored to serve"
FL Lic # B 2700066

Unauthorized Tenants / Squatters - We will monitor unauthorized persons moving into a home in your community and report it to management. We will assist with identification of squatters at homes under foreclosure or for rent. Our company works very closely with local police to assist in the identification and removal of unauthorized squatters. New laws and directives allow for these offenders to be removed without the lengthy eviction process.

Parking Enforcement and Towing - If asked to enforce parking violations, our officers can issue warnings and even tow away illegally parked or abandoned vehicles within your community.

Management Assistance Services (MAS) – Our officers will assist the property management team and the community association board of directors in identifying and reporting violations of association rules, safety hazards, unauthorized commercial vehicles, unauthorized tenants or squatters. These violations and other observations will be documented and /or photographed and submitted to the property manager in a timely fashion for review and possible follow up action.

We will act as your liaison with the local police department to address any issues requiring police services. We also assist communities in setting up Citizens' Crime Watch Programs.

License information

Delta Five Security is licensed as a Security Agency in the state of Florida under license #B 2700066.

FLORIDA DEPARTMENT OF AGRICULTURE AND CONSUMER SERVICES	
NICOLE "NIKKI" FRIED COMMISSIONER	B 2700066 LICENSE NUMBER
DIVISION OF LICENSING	04/25/25 DATE OF EXPIRATION
03/02/22 DATE ISSUED	
DELTA FIVE SECURITY, LLC 13595 S W 134TH AVENUE SUITE 211 MIAMI, FL 33186	
DIAZ, JOSE A., PRESIDENT	
THE SECURITY AGENCY NAMED ABOVE IS LICENSED AND REGULATED UNDER THE PROVISIONS OF CHAPTER 493, FLORIDA STATUTES.	
	
<i>Nicole Fried</i> NICOLE "NIKKI" FRIED COMMISSIONER	

Recommended budget for Tree Island Community Development District:

At Delta Five Security, our goal is to provide our clients the best value for their investment. In order to come up with an hourly rate, we take into account the manpower requirements of the account, the scope of services required at the property, the level of service that most adequately meets the specific needs of the client, plus any special equipment or services needed to operate at the post.

Our company does not try to obtain accounts based solely on low prices because **low prices and good quality are incompatible terms in the security industry**. We aim to offer competitive pricing that considers the ability to provide quality services that exceed the industry standards and which we truly feel would provide you the best value for your security investment.

Enclosed, you will find TWO proposed budgets based on the scope of services and personnel you requested.

Budget #1 – 24/7

Delta Five Security - Proposed budget for Tree Island Community - 168 hrs per week

Post Type	Hourly Rate	Weekly Hours	Monthly Cost	Yearly Cost	Sales Tax 7%	Total Cost
Unarmed Security Officer	\$20.75	168	\$15,106.00	\$181,272.00		\$181,272.00
Includes GPS tracking and reporting software			\$0.00	\$0.00	\$0.00	\$0.00
Supervision and Inspections			\$0.00	\$0.00	\$0.00	\$0.00
Monthly status reports			\$0.00	\$0.00	\$0.00	\$0.00
Assigned Account Manager			\$0.00	\$0.00	\$0.00	\$0.00
Estimated Cost of Holidays			\$145.25	\$1,743.00		\$1,743.00
Sub-Totals		168	\$15,251.25	\$183,015.00	\$0.00	\$183,015.00

Vehicle Type	Number of Units	Monthly Cost per Unit	Total Monthly Cost of Vehicles	Annual Cost of Vehicles	Veh Sales Tax of 7%	Total Cost of Vehicles
Electric Golf Carts	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Patrol Vehicles	1	\$1,000.00	\$1,000.00	\$12,000.00		\$12,000.00
Bicycles	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client pays the actual cost of fuel + 5% fee or provides fueling options at client's expense. Estimated yearly cost of fuel:						\$6,000.00
Proposed Annual Security Budget				195,015.00	0.00	201,015.00

Number of units in complex	274
Monthly cost per unit	\$61.14
Annual cost per unit	\$733.63

** This proposed budget is an estimate of costs. The actual cost could vary due to a client requesting an increase or decrease in the number of hours worked or the number of vehicles or holidays worked at the holiday rate specified in the contract.

Budget #2 – 12/7

Delta Five Security - Proposed budget for Tree Island Community - 84 hrs per week

Post Type	Hourly Rate	Weekly Hours	Monthly Cost	Yearly Cost	Sales Tax 7%	Total Cost
Unarmed Security Officer	\$21.35	84	\$7,771.40	\$93,256.80		\$93,256.80
Includes GPS tracking and reporting software			\$0.00	\$0.00	\$0.00	\$0.00
Supervision and Inspections			\$0.00	\$0.00	\$0.00	\$0.00
Monthly status reports			\$0.00	\$0.00	\$0.00	\$0.00
Assigned Account Manager			\$0.00	\$0.00	\$0.00	\$0.00
Estimated Cost of Holidays			\$74.73	\$896.70		\$896.70
Sub-Totals		84	\$7,846.13	\$94,153.50	\$0.00	\$94,153.50

Vehicle Type	Number of Units	Monthly Cost per Unit	Total Monthly Cost of Vehicles	Annual Cost of Vehicles	Veh Sales Tax of 7%	Total Cost of Vehicles
Electric Golf Carts	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Patrol Vehicles	1	\$1,000.00	\$1,000.00	\$12,000.00		\$12,000.00
Bicycles	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client pays the actual cost of fuel + 5% fee or provides fueling options at client's expense. Estimated yearly cost of fuel:						\$6,000.00
Proposed Annual Security Budget				106,153.50	0.00	112,153.50

Number of units in complex	274
Monthly cost per unit	\$34.11
Annual cost per unit	\$409.32

** This proposed budget is an estimate of costs. The actual cost could vary due to a client requesting an increase or decrease in the number of hours worked or the number of vehicles or holidays worked at the holiday rate specified in the contract.

Why choose Delta Five Security?

The vast experience of the principals, managers and associates of the company means that your business, your home and your family are in the very best hands when you enlist Delta Five Security to protect them. When you engage our services and become our client, you will notice a remarkable difference from many of the security companies you may have previously used.

Ten reasons why you should choose Delta Five Security:

1. Clarity and complete honesty on pricing issues – If we cannot service it right, we will not sell it. Online GPS guard management and reporting system included in price.
2. Excellent support and personal customer service in all price categories.
3. The best value for your security investment when compared to our competition.
4. Exclusive training programs designed for our company by leading experts in their respective fields.
5. We customize training to fit your needs. No cookie cutter approach is applicable to all accounts.
6. We strictly enforce grooming, uniform wear and personal hygiene standards of our personnel.
7. Customized reports for each post – Management can easily track performance and review results.
8. We create a partnership with our clients and promote teamwork at every post.
9. Friendly, courteous and efficient service 24 hours a day, every day.
10. The most experience security team in South Florida.

There are literally thousands of security companies out there and we must earn your business, your trust and your respect each and every day. We promise to work hard to become the premier source for all your security and investigations.



"Honesty, transparency and excellent customer service"

Delta Five Security - Proposed budget for Tree Island Community - 84 hrs per week

Post Type	Hourly Rate	Weekly Hours	Monthly Cost	Yearly Cost	Sales Tax 7%	Total Cost
Unarmed Security Officer	\$21.35	84	\$7,771.40	\$93,256.80		\$93,256.80
Includes GPS tracking and reporting software			\$0.00	\$0.00	\$0.00	\$0.00
Supervision and Inspections			\$0.00	\$0.00	\$0.00	\$0.00
Monthly status reports			\$0.00	\$0.00	\$0.00	\$0.00
Assigned Account Manager			\$0.00	\$0.00	\$0.00	\$0.00
Estimated Cost of Holidays			\$74.73	\$896.70		\$896.70
Sub-Totals		84	\$7,846.13	\$94,153.50	\$0.00	\$94,153.50

Vehicle Type	Number of Units	Monthly Cost per Unit	Total Monthly Cost of Vehicles	Annual Cost of Vehicles	Veh Sales Tax of 7%	Total Cost of Vehicles
Electric Golf Carts	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Patrol Vehicles	1	\$1,000.00	\$1,000.00	\$12,000.00		\$12,000.00
Bicycles	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Client pays the actual cost of fuel + 5% fee or provides fueling options at client's expense. **Estimated yearly cost of fuel:** \$6,000.00

Proposed Annual Security Budget 106,153.50 0.00 112,153.50

Number of units in complex	274
Monthly cost per unit	\$34.11
Annual cost per unit	\$409.32

** This proposed budget is an estimate of costs. The actual cost could vary due to a client requesting an increase or decrease in the number of hours worked or the number of vehicles or holidays worked at the holiday rate specified in the contract.

Delta Five Security - Proposed budget for Tree Island Community - 168 hrs per week

Post Type	Hourly Rate	Weekly Hours	Monthly Cost	Yearly Cost	Sales Tax 7%	Total Cost
Unarmed Security Officer	\$20.75	168	\$15,106.00	\$181,272.00		\$181,272.00
Includes GPS tracking and reporting software			\$0.00	\$0.00	\$0.00	\$0.00
Supervision and Inspections			\$0.00	\$0.00	\$0.00	\$0.00
Monthly status reports			\$0.00	\$0.00	\$0.00	\$0.00
Assigned Account Manager			\$0.00	\$0.00	\$0.00	\$0.00
Estimated Cost of Holidays			\$145.25	\$1,743.00		\$1,743.00
Sub-Totals		168	\$15,251.25	\$183,015.00	\$0.00	\$183,015.00

Vehicle Type	Number of Units	Monthly Cost per Unit	Total Monthly Cost of Vehicles	Annual Cost of Vehicles	Veh Sales Tax of 7%	Total Cost of Vehicles
Electric Golf Carts	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Patrol Vehicles	1	\$1,000.00	\$1,000.00	\$12,000.00		\$12,000.00
Bicycles	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Client pays the actual cost of fuel + 5% fee or provides fueling options at client's expense. **Estimated yearly cost of fuel:** \$6,000.00

Proposed Annual Security Budget **195,015.00** **0.00** **201,015.00**

Number of units in complex	274
Monthly cost per unit	\$61.14
Annual cost per unit	\$733.63

** This proposed budget is an estimate of costs. The actual cost could vary due to a client requesting an increase or decrease in the number of hours worked or the number of vehicles or holidays worked at the holiday rate specified in the contract.

LAW OFFICES

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STEVEN F. BILLING (1947-1998)
HAYWARD D. GAY (1943-2007)

February 6, 2023

VIA E-MAIL ONLY—asilva@sdsinc.org

Mr. Armando Silva
District Manager
Special District Services, LLC
2501 A Burns Road
Palm Beach Gardens, FL 33410

**Re: Adjustment to District Counsel Fee Structure
Tree Island Estates Community Development District
Our File: 571.03453**

Dear Armando:

This firm's current fee structure has been in place since 2017. Although we are certainly mindful of the necessity to keep increases in the District's expenses, including the cost of legal services, to a minimum, it has become necessary for us to adjust our hourly rates effective May 1, 2023, as follows:

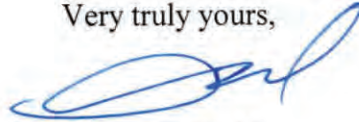
- Attorneys/Partners: \$275.00 per hour
- Attorneys/Associates: \$225.00 per hour

This hourly fee structure will be adjusted on a periodic basis in connection with the District's budget process no later than every third Fiscal Year to reflect changes in the Consumer Price Index published by the U. S. Department of Labor. The CPI has reflected a 20.7% increase since the year 2017 and we have not raised our fees during that time.

Mr. Armando Silva
February 6, 2023
Page 2

Naturally, should you have any questions or require any further information in support of this adjustment you should feel free to contact me at your convenience. As I think you are aware, we very much appreciate the opportunity to serve as District Counsel as well as your courtesy and cooperation with regard to the necessity of what we believe to be both infrequent and reasonable adjustments to our schedule of professional fees.

Very truly yours,



Ginger E. Wald
For the Firm

GEW/jmp



8935 NW 35 Lane, Suite 101 Doral, FL 33172
Tel (305) 640-1345
Email Alvarez@AlvarezEng.com
Website www.alvarezeng.com

February 16, 2023

Board of Supervisors
Tree Island Estates Community Development District
Attn: District Manager Armando Silva
Special District Services, Inc.
2501 Burns Road
Palm Beach Gardens, FL 33410

Reference: Tree Island Estates Community Development District
Alvarez Engineers Personnel Billing Rates
Via: Email Only: asilva@sdsinc.org

Dear Board of Supervisors,

In accordance with the terms of the Engineering Agreement, dated November 20, 2007, between Alvarez Engineers, Inc. and the CDD, I would like to respectfully request the Board of Supervisors to consider updating our hourly personnel billing rates and staff classifications to our proposed 2023 rates as shown in the attached table. Our rates were last revised and approved via motion by the Board on May 18, 2016.

Please let me know if you have any questions or if you would like to discuss this further.

Sincerely,


Juan R. Alvarez, President
Alvarez Engineers, Inc.

Tree Island Estates CDD			
Current 2016 Rates		Proposed 2023 Rates	
Principal	\$ 200.00	Principal	\$ 220.00
Chief Engineer			
Senior Engineer	\$ 170.00	Senior Engineer	\$ 185.00
Senior Project Engineer			
Project Manager	\$ 150.00	Engineer 2	\$ 160.00
Project Engineer	\$ 130.00	Engineer 1	\$ 140.00
		Electrical Engineer	\$ 135.00
Engineer	\$ 125.00	Engineer Intern	\$ 130.00
CADD	\$ 95.00	Senior Designer	\$ 110.00
		CADD/Computer Technician	\$ 100.00
		Senior Engineering Technician	\$ 95.00
Engineering Technician	\$ 85.00	Engineering Technician	\$ 90.00
Senior Administrative	\$ 80.00	Senior Administrative	\$ 95.00
Administrative	\$ 50.00	Administrative	\$ 60.00

Staff Classification

Principal
Senior Engineer
Engineer 2
Engineer 1
Electrical Engineer
Engineer Intern
Senior Designer
CADD/Computer Technician
Senior Engineering Technician
Engineering Technician
Senior Administrative
Administrative

Definition

Professional Engineer with 20+ years of post registration experience
Professional Engineer with 10+ years of post registration experience
Professional Engineer with 5+ years of post registration experience
Professional Engineer with 0+ years of post registration experience
Electrical Engineer with 2+ years of post-graduate experience
Entry level with engineering degree; Engineering Intern License
15+ years of design experience, non-registered
Design and Drafting with 1+ year of experience
5+ years of experience
Entry level, with 0-4 years of experience
Degreed executive assistant with 8+ years of experience
Secretary / Clerical