



**TRAILS AT MONTEREY  
COMMUNITY DEVELOPMENT  
DISTRICT**

**MIAMI-DADE COUNTY  
REGULAR BOARD MEETING  
OCTOBER 25, 2022  
6:30 P.M.**

Special District Services, Inc.  
8785 SW 165<sup>th</sup> Avenue, Suite 200  
Miami, FL 33024

[www.trailsatmontereycdd.org](http://www.trailsatmontereycdd.org)

786.347.2711 Telephone  
877.SDS.4922 Toll Free  
561.630.4923 Facsimile

**AGENDA**  
**TRAILS OF MONTEREY**  
**COMMUNITY DEVELOPMENT DISTRICT**  
Kendall Executive Center  
8785 SW 165<sup>th</sup> Avenue, Suite 200  
Miami, FL 33193  
**REGULAR BOARD MEETING**  
**October 25, 2022**  
**6:30 p.m.**

- A. Call to Order
- B. Proof of Publication.....Page 1
- C. Establish Quorum
- D. Accept Resignation of Supervisor Ileana Suarez.....Page 2
- E. Appointment to Vacancies
- F. Administer Oath of Office and Review Board Member Duties and Responsibilities
- G. Election of Officers
- H. Additions or Deletions to Agenda
- I. Comments from the Public for Items Not on the Agenda
- J. Approval of Minutes
  - 1. May 24, 2022 Regular Board Meeting Minutes & PH.....Page 3
- K. New Business
  - 1. Consider Approval of Allstate Resource Management 2023 Increase Notice for Budgeting Purposes.....Page 9
  - 2. Consider Approval of Resolution No. 2022-05 – Authorizing and Adopting an Amended Final Fiscal Year 2021/2022 Budget.....Page 10
  - 3. Discussion Regarding 1860 SW 155<sup>th</sup> Ave Encroachment.....Page 15
  - 4. Ratify and Approve No Parking Signage Installation.....Page 30
- L. Old Business
- M. Administrative Matters
  - 1. Financial Update.....Page 35
  - 2. Accept and Receive 2022 Trails at Monterey Annual Engineering Report.....Page 40
  - 3. Accept and Receive 20-Year Stormwater Needs Analysis as required by FS Section 403.9302..Page 46
- N. Board Member/Staff: Additional Comments/Requests
- O. Adjourn

## Miscellaneous Notices



Published in Miami Daily Business Review on October 17, 2022

### Location

Miami-Dade County,

### Notice Text

TRAILS AT MONTEREY COMMUNITY  
DEVELOPMENT DISTRICT  
FISCAL YEAR 2022/2023 REGULAR  
MEETING SCHEDULE

NOTICE IS HEREBY GIVEN that the Board of Supervisors of the Trails at Monterey Community Development District will hold Regular Meetings at 6:30 p.m. in the Conference Room at Kendall Executive Center located at 8785 SW 165th Avenue, Suite 200, Miami, Florida 33193, on the following dates:

October 25, 2022

February 28, 2023

April 25, 2023

June 27, 2023

August 22, 2023

The purpose of the meetings is to conduct any business coming before the Board. Meetings are open to the public and will be conducted in accordance with the provisions of law. Copies of the Agendas for any of the meetings may be obtained from the District's website [www.trailsatmontereycdd.org](http://www.trailsatmontereycdd.org) or by contacting the District Manager at 786-347-2711 Ext. 2011 and/or toll free at 1-877-737-4922.

From time to time one or two Supervisors may participate by telephone; therefore a speaker telephone will be present at the meeting location so that the Supervisors may be fully informed of the discussions taking place. Said meetings 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 786-347-2711 Ext 2011 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.

TRAILS AT MONTEREY COMMUNITY DEVELOPMENT DISTRICT  
[www.trailsatmontereycdd.org](http://www.trailsatmontereycdd.org)  
10/17 22-41/0000625741M

---

Board of Supervisors  
Trails at Monterey Community Development District  
c/o Special District Services, Inc.,  
8785 SW 165th Avenue  
Suite 200  
Miami, FL 33193

**RE: Resignation Letter**

Dear Board of Supervisors,

Please be advised that I Ileana Suarez-Hale am resigning my position as Board Member and Officer holding Seat #4 of the **Trails at Monterey Community Development District** Board of Supervisors effective as of 06/15/22.

Sincerely,



---

Ileana Suarez (Hale)  
15619 SW 9 lane, Miami FL 33194  
ileanashale@gmail.com

**TRAILS AT MONTEREY COMMUNITY DEVELOPMENT DISTRICT  
PUBLIC HEARING & REGULAR BOARD MEETING  
MAY 24, 2022**

**A. CALL TO ORDER**

Mrs. Perez called the Trails at Monterey Community Development District (the “District”) Regular Board Meeting of May 24, 2022, to order at 6:44 p.m. in the Kendall Executive Center located at 8785 SW 165<sup>th</sup> Avenue, Suite 200, Miami, Florida 33193.

**B. PROOF OF PUBLICATION**

Mrs. Perez presented proof of publication that notice of the Regular Board Meeting had been published in the *Miami Daily Business Review* on October 13, 2021, as part of the District’s Fiscal Year 2021/2022 Meeting Schedule, as legally required.

**C. ESTABLISH A QUORUM**

Mrs. Perez stated that the attendance of Chairperson Ileana Suarez, Vice Chairperson Juan Sanhueza and Supervisor Carlos Delgado constituted a quorum and it was in order to proceed with the meeting.

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

**D. ELECTION OF OFFICERS**

This was not required at this time.

**E. ADDITIONS OR DELETIONS TO AGENDA**

There were no additions or deletions to the agenda.

**F. COMMENTS FROM THE PUBLIC FOR ITEMS NOT ON THE AGENDA**

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

**G. APPROVAL OF MINUTES**

**1. March 22, 2022, Regular Board Meeting**

The minutes of the March 22, 2022, Regular Board Meeting were presented for approval.

<p>There being no changes, a <b>MOTION</b> was made by Supervisor Sanhueza, seconded by Supervisor Delgado and unanimously passed approving the minutes of the March 22, 2022, Regular Board Meeting, as presented.</p>
---

Mrs. Perez then recessed the Regular Board Meeting and simultaneously opened the Public Hearing.

**H. PUBLIC HEARING**

**1. Proof of Publication**

Mrs. Perez presented proof of publication that notice of the Public Hearing had been published in the *Miami Daily Business Review* on May 4, 2022, and May 11, 2022, as legally required.

**2. Receive Public Comment on Fiscal Year 2022/2023 Final Budget**

Mrs. Perez opened the Public Comment portion of the Public Hearing to receive comments on the Fiscal Year 2022/2023 Final Budget. There were no comments.

Mrs. Perez then closed the Public Hearing and reconvened the Regular Board Meeting.

**3. Consider Resolution No. 2022-02 – Adopting a Fiscal Year 2022/2023 Final Budget**

Mrs. Perez presented Resolution No. 2022-02, entitled:

**RESOLUTION NO. 2022-02  
A RESOLUTION OF THE TRAILS AT MONTEREY COMMUNITY  
DEVELOPMENT DISTRICT ADOPTING A FISCAL YEAR 2022/2023 BUDGET.**

Mrs. Perez read the title of the resolution into the record and stated that it provides for approving and adopting the fiscal year 2022/2023 Final Budget and the non-ad valorem special assessment tax roll (Assessment Levy).

A **MOTION** was made by Supervisor Delgado, seconded by Supervisor Sanhueza and unanimously passed adopting Resolution No. 2022-02, approving the Fiscal Year 2022/2023 Final Budget, as presented and setting the fiscal year 2022/2023 Final Budget and non-ad valorem special assessment tax roll (Assessment Levy).

**I. OLD BUSINESS**

**1. Update on Lake Bank Encroachments**

Presented in the meeting book was a list of various properties that were still not in compliance with the encroachments with details on the status per address:

Address	Encroachment Type	Date Last Visit	Last Actions Taken	Status
15471 SW 11 TER	Palm Trees	5/16/2022	Letter Sent to the homeowner on 4/22/2022. Email Received from Homeowner (Attachment)	Visited on May 16th, 2022. Violation corrected, except Papaya Tree (see attachment) <b>Needs to be removed.</b>
1442 SW 155 CT	Palm Trees	5/16/2022	Letter Sent to the homeowner on 4/22/2022	On May 16th, 2022, the encroachment persists. See picture attached.

15640 SW 16 ST	Palm Trees	5/16/2022	Letter Sent to the homeowner on 4/22/2022	Homeowner called District to advise that he had removed the encroachment. See picture attached. During May 16th, 2022, visit, we could verify the encroachment was corrected.
15659 SW 20 ST	Palm Trees	5/16/2022	Letter Sent to the homeowner on 4/22/2022	During May 16th, 2022, visit, we could notice that the encroachment was corrected.
15451 SW 11 TER	Rocks on the lake shoreline. Palm trees. Structure exceeding property boundaries.	5/16/2022	Discussed by the Board with the Homeowner during 3/22/22 District's meeting. Owner's request was denied, and as per the District's Board directions, Improvements must be removed, and area restored to its original condition.	<u>Legal</u> On May 16th, 2022, the encroachment persists. See picture attached.
1860 SW 155 AVE	Palm Trees	5/16/2022	Second Letter from District Counsel sent on 4/21/2021	<u>Legal</u> On May 16th, 2022, the encroachment persists. See picture attached.

Each property was reviewed by the Board and a discussion ensued.

A **motion** was made by Supervisor Delgado and seconded by Supervisor Sanhueza and unanimously passed directing District management to proceed with the removal of the identified and noticed trees and palms after the allotted time-period has passed and pursuant to the corresponding Modern Image proposals.

The following locations were removed from the list, as they are located outside of the District's boundaries:

2	1050 SW 154 AVE	Palm Trees	4/14/2022	Visited/Pictures taken See Attached Aerial View/Map Taken from District's Engineers Report	Out of District's Property.
2	1110 SW 154 AVE	Palm Trees	4/14/2022	Visited/Pictures taken See Attached Aerial View/Map Taken from District's Engineers Report	Out of District's Property.
2	15440 SW 10 ST	Palm Trees	4/14/2022	Visited/Pictures taken See Attached Aerial	Out of District's Property.
2	15421 SW 11 TER	Palm Trees	4/14/2022	Visited/Pictures taken See Attached Aerial View/Map Taken from District's Engineers Report	Out of District's Property.

**2. Discussion Regarding Javier Brito Response and Request Regarding 15471 SW 11<sup>th</sup> Terrace Encroachment**

The request from Mr. Brito was presented in the meeting book for Boards review and District management requested direction.

The request was denied by the Board and direction for said tree is to be removed.

**J. NEW BUSINESS**

**1. Consider Resolution No. 2022-03 – Adopting a Fiscal Year 2022/2023 Meeting Schedule**

Mrs. Perez presented Resolution No. 2022-03, entitled:

**RESOLUTION NO. 2022-03**

**A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE TRAILS AT MONTEREY COMMUNITY DEVELOPMENT DISTRICT, ESTABLISHING A REGULAR MEETING SCHEDULE FOR FISCAL YEAR 2022/2023 AND SETTING THE TIME AND LOCATION OF SAID DISTRICT MEETINGS; AND PROVIDING AN EFFECTIVE DATE.**

Mrs. Perez read the title of the resolution into the record and noted that meetings would remain at the same location of the District in the Kendall Executive Center located at 8785 SW 165<sup>th</sup> Avenue, Suite 200, Miami, FL 33193, with the start time of 6:30 p.m. on the following dates:

**October 25, 2022 Amended Budget**  
**February 28, 2023**  
**April 25, 2023 Proposed Budget**  
**June 27, 2023 Final Budget**  
**August 22, 2023**

A **MOTION** was made by Supervisor Delgado, seconded by Supervisor Suarez and unanimously passed adopting Resolution No. 2022-03, approving the Regular Meeting Schedule for Fiscal Year 2022/2023, holding meetings in the Kendall Executive Center located at 8785 SW 165<sup>th</sup> Avenue, Suite 200, Miami, Florida 33193, as required by law.

**2. Consider Coconut Removal Amendment to Agreement on an As Needed Basis**



The Board discussed this item and declined the option for an Amendment.

A **MOTION** was made by Supervisor Sanhueza, seconded by Supervisor Suarez and unanimously passed providing District management the authority to approve work to be conducted, as deemed necessary and within budget.

**K. ADMINISTRATIVE MATTERS**

**1. Financial Update**

Mrs. Perez presented the monthly financial statements presented in the meeting book. Available funds as of April 30, 2022, were \$263,650.70.

A **MOTION** was then made by Supervisor Sanhueza, seconded by Supervisor Suarez and unanimously passed ratifying the financial transactions and reports, as presented.

**2. General Election and Candidate Qualifying Period**

Mrs. Perez reminded the Board that the official qualifying period for the office of Supervisor runs from noon, Monday, June 13, 2022 through noon, Friday, June 1, 2022. In line with F.S. 99.061(8), the pre-qualifying period begins on May 30, 2022.

A qualifying office may accept and hold qualifying papers submitted not earlier than 14 days prior (Monday, May 30, 2022) to the beginning of the qualifying period to be processed and filed during the qualifying period. [F.S. 99.061(8)] {Please note that our office will be closed on May 30, 2022 in observance of Memorial Day.}

**TRAILS AT MONTEREY COMMUNITY DEVELOPMENT DISTRICT**

**General Election**

**Ordinance No. 02-124; Adopted 07/09/2002**

<b>AS</b>	<b>Seat 1 Olga Nadal</b>	<b>Expires 2024</b>
<b>V-CHR</b>	<b>Seat 2 Juan Sanhueza</b>	<b>Expires 2024</b>
<b>AS</b>	<b>Seat 3 VACANT</b>	<b>Expires 2022</b>
<b>CHR</b>	<b>Seat 4 Ileana Suarez</b>	<b>Expires 2022</b>
<b>AS</b>	<b>Seat 5 Carlos Delgado</b>	<b>Expires 2024</b>

**3. Statement of Financial Interests – 2021 Form 1**

Mrs. Perez reminded the Board that they should be receiving in the mail their 2021 Form 1 – Statement of Financial Interests, which need to be completed and mailed into the Supervisor of Elections’ office no later than July 1, 2022.

**L. BOARD MEMBER/STAFF ADDITIONAL COMMENTS/REQUESTS**

There were no closing comments from Board Members or staff.

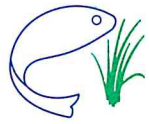
**M. ADJOURNMENT**

There being no further business to come before the Board, a **MOTION** was made by Supervisor Suarez, seconded by Supervisor Sanhueza to adjourn the meeting at 7:20 p.m. The **MOTION** carried unanimously.

**ATTESTED BY:**

\_\_\_\_\_  
**Secretary/Assistant Secretary**

\_\_\_\_\_  
**Chairman/Vice-Chair**



We understand that many of you are heading into budget season. Unfortunately, the cost of fuel and goods to maintain your accounts has seen a dramatic increase in the last year. Many products to keep waterways and preserves healthy and clean have risen as much as 80%.

There has been no decision on the final increase for next year (2023), but we recommend budgeting for an increase of 5-10%. We are hoping to keep your costs on the lower end, but unfortunately there has been no slowdown in the increase we have been incurring.

We hope you understand and if prices drop in the future we can look to adjust accordingly.

**RESOLUTION NO. 2022-05**

**A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE TRAILS AT MONTEREY 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.**

**WHEREAS**, the Board of Supervisors of the Trails at Monterey Community Development District (“District”) is empowered to provide a funding source and to impose special assessments upon the properties within the District; and,

**WHEREAS**, the District has prepared for consideration and approval an Amended Budget.

**NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE TRAILS AT MONTEREY COMMUNITY DEVELOPMENT DISTRICT, THAT:**

**Section 1.** The Amended Budget for Fiscal Year 2021/2022 attached hereto as Exhibit “A” is hereby approved and adopted.

**Section 2.** The Secretary/Assistant Secretary of the District is authorized to execute any and all necessary transmittals, certifications or other acknowledgements or writings, as necessary, to comply with the intent of this Resolution.

**PASSED, ADOPTED and EFFECTIVE** this 25<sup>th</sup> day of October, 2022.

**ATTEST:**

**TRAILS AT MONTEREY  
COMMUNITY DEVELOPMENT DISTRICT**

By: \_\_\_\_\_  
Secretary/Assistant Secretary

By: \_\_\_\_\_  
Chairperson/Vice Chairperson

Trails At Monterey  
Community Development District

**Amended Final Budget For  
Fiscal Year 2021/2022  
October 1, 2021 - September 30, 2022**

# **CONTENTS**

- I        AMENDED FINAL OPERATING FUND BUDGET**
- II       AMENDED FINAL DEBT SERVICE FUND BUDGET**

**AMENDED FINAL BUDGET**  
**TRAILS AT MONTEREY COMMUNITY DEVELOPMENT DISTRICT**  
**OPERATING FUND**  
**FISCAL YEAR 2021/2022**  
**OCTOBER 1, 2021 - SEPTEMBER 30, 2022**

	FISCAL YEAR 2021/2022 BUDGET 10/1/21 - 9/30/22	AMENDED FINAL BUDGET 10/1/21 - 9/30/22	YEAR TO DATE ACTUAL 10/1/21 - 9/29/22
<b>REVENUES</b>			
ADMINISTRATIVE ASSESSMENTS	60,654	60,906	60,906
MAINTENANCE ASSESSMENTS	34,186	34,186	34,186
DEBT ASSESSMENTS	219,413	219,415	219,415
OTHER REVENUES	0	0	0
INTEREST INCOME	420	260	255
<b>TOTAL REVENUES</b>	<b>\$ 314,673</b>	<b>\$ 314,767</b>	<b>\$ 314,762</b>
<b>EXPENDITURES</b>			
<b>MAINTENANCE EXPENDITURES</b>			
AQUATIC/STORMWATER MANAGEMENT	7,000	7,000	5,532
MITIGATION MAINTENANCE	3,135	2,000	875
LAKE EASEMENT/LANDSCAPE MAINTENANCE	20,000	20,000	15,610
ENGINEERING/INSPECTIONS	2,000	3,700	2,725
<b>TOTAL MAINTENANCE EXPENDITURES</b>	<b>\$ 32,135</b>	<b>\$ 32,700</b>	<b>\$ 24,742</b>
<b>ADMINISTRATIVE EXPENDITURES</b>			
SUPERVISOR FEES	5,000	1,800	1,800
PAYROLL TAXES (EMPLOYER)	400	138	138
MANAGEMENT	30,600	30,600	30,600
SECRETARIAL	3,600	3,600	3,600
LEGAL	10,500	9,500	7,442
ASSESSMENT ROLL	6,000	6,000	6,000
AUDIT FEES	3,500	3,500	3,500
INSURANCE	6,000	5,706	5,706
LEGAL ADVERTISING	750	750	354
MISCELLANEOUS	1,600	1,000	470
POSTAGE	325	240	221
OFFICE SUPPLIES	625	440	396
DUES & SUBSCRIPTIONS	175	175	175
TRUSTEE FEES	3,500	4,256	4,256
CONTINUING DISCLOSURE FEE	350	350	350
WEBSITE MANAGEMENT	750	750	750
<b>TOTAL ADMINISTRATIVE EXPENDITURES</b>	<b>\$ 73,675</b>	<b>\$ 68,805</b>	<b>\$ 65,758</b>
<b>TOTAL EXPENDITURES</b>	<b>\$ 105,810</b>	<b>\$ 101,505</b>	<b>\$ 90,500</b>
<b>REVENUES LESS EXPENDITURES</b>	<b>\$ 208,863</b>	<b>\$ 213,262</b>	<b>\$ 224,262</b>
BOND PAYMENTS	(206,248)	(209,170)	(209,170)
<b>BALANCE</b>	<b>\$ 2,615</b>	<b>\$ 4,092</b>	<b>\$ 15,092</b>
COUNTY APPRAISER & TAX COLLECTOR FEE	(6,285)	(3,028)	(3,028)
DISCOUNTS FOR EARLY PAYMENTS	(12,570)	(11,648)	(11,648)
<b>EXCESS/SHORTFALL</b>	<b>\$ (16,240)</b>	<b>\$ (10,584)</b>	<b>\$ 416</b>
CARRYOVER FROM PRIOR YEAR	16,240	16,240	0
<b>NET EXCESS/SHORTFALL</b>	<b>\$ -</b>	<b>\$ 5,656</b>	<b>\$ 416</b>
FUND BALANCE AS OF 9/30/21		\$221,422	
FY 2021/2022 ACTIVITY		(\$10,584)	
FUND BALANCE AS OF 9/30/22		\$210,838	

**Notes**

Carryover From Prior Year Of \$16,240 was used to reduce Fiscal Year 2021/2022 Assessments.  
\$20,295 Of Fund Balance To Be Used To Reduce 2022/2023 Assessments.

**AMENDED FINAL BUDGET**  
**TRAILS AT MONTEREY COMMUNITY DEVELOPMENT DISTRICT**  
**DEBT SERVICE FUND**  
**FISCAL YEAR 2021/2022**  
**OCTOBER 1, 2021 - SEPTEMBER 30, 2022**

	<b>FISCAL YEAR 2021/2022 BUDGET 10/1/21 - 9/30/22</b>	<b>AMENDED FINAL BUDGET 10/1/21 - 9/30/22</b>	<b>YEAR TO DATE ACTUAL 10/1/21 - 9/29/22</b>
<b>REVENUES</b>			
Interest Income	25	365	363
NAV Tax Collection	206,248	209,170	209,170
<b>Total Revenues</b>	<b>\$ 206,273</b>	<b>\$ 209,535</b>	<b>\$ 209,533</b>
<b>EXPENDITURES</b>			
Principal Payments	125,000	125,000	125,000
Interest Payments	79,413	81,835	81,835
Bond Redemption	1,860	0	0
<b>Total Expenditures</b>	<b>\$ 206,273</b>	<b>\$ 206,835</b>	<b>\$ 206,835</b>
<b>Excess/ (Shortfall)</b>	<b>\$ -</b>	<b>\$ 2,700</b>	<b>\$ 2,698</b>

FUND BALANCE AS OF 9/30/21	\$206,831
FY 2021/2022 ACTIVITY	\$2,700
FUND BALANCE AS OF 9/30/22	\$209,531

Notes

Reserve Fund Balance = \$103,124\*. Revenue Fund Balance = \$106,407\*.

Revenue Fund Balance To Be Used To Make Interest Payment On 11-1-22 Of \$38,496.

\* Approximate Amounts

**Series 2012 Refunding Bonds Information**

Original Par Amount =	\$2,830,000	Annual Principal Payments Due:
Interest Rate =	1.75% - 4.25%	May 1st
Issue Date =	May 2012	Annual Interest Payments Due:
Maturity Date =	May 2033	May 1st & November 1st

Par Amount As Of 9/30/22 = \$1,755,000



RE: TAM: 1860 SW 155 Avenue - owner possesses documentation (pictures attached and physical evidence) removing trees poses unacceptable risk

Juan R. Alvarez <Juan.Alvarez@AlvarezEng.com>

Wed 10/5/2022 4:50 PM

To: Ginger E. Wald <gwald@bclmr.com>; Gloria Perez <gperez@sdsinc.org>; Ronald Galvis <rGalvis@sdsinc.org>

Cc: jeffmodernimage@bellsouth.net <jeffmodernimage@bellsouth.net>; Frances Ware <FWare@sdsinc.org>; Reynaldo Chinae <Reynaldo.Chinea@AlvarezEng.com>; Gabrielle Vitucci <gvitucci@sdsinc.org>

The property owner claims the roots of the coconut trees are helping to prevent the deck in their property from sliding further, and their fence from sinking. I think the lack of berm is one of the reasons for the movement of soil. Another possible and additional reason may be the preparation and compaction of the soil under the pavers, but for lack of information, I am not claiming the latter.

I think the coconut trees should be removed from CDD property as indicated in previous letters sent to the property owner and the owner should build the adequate berm inside their property and along a 4-foot strip of land adjacent to the rear property line to protect the CDD lake slopes from erosion due to runoff from their property, and to protect their improvements inside their lot.



Juan R. Alvarez, P.E.

(305) 640-1345

[Juan.Alvarez@alvarezeng.com](mailto:Juan.Alvarez@alvarezeng.com)

**From:** Ginger E. Wald <gwald@bclmr.com>

**Sent:** Wednesday, October 5, 2022 3:37 PM

**To:** Juan R. Alvarez <Juan.Alvarez@AlvarezEng.com>; Gloria Perez <gperez@sdsinc.org>; Ronald Galvis <rGalvis@sdsinc.org>

**Cc:** jeffmodernimage@bellsouth.net; Frances Ware <FWare@sdsinc.org>; Reynaldo Chinae <Reynaldo.Chinea@AlvarezEng.com>; Gabrielle Vitucci <gvitucci@sdsinc.org>

**Subject:** RE: TAM: 1860 SW 155 Avenue - owner possesses documentation (pictures attached and physical evidence) removing trees poses unacceptable risk

What do you suggest for the inadequate berm?

Ginger E. Wald, Esq.

Billing, Cochran, Lyles, Mauro & Ramsey, P.A.

515 East Las Olas Boulevard | 6th Floor | Fort Lauderdale, FL 33301

Phone: 954/764-7150 | Fax: 954/764-7279 | E-mail: [GWald@bclmr.com](mailto:GWald@bclmr.com)

Website: [www.billingcochran.com](http://www.billingcochran.com)

**CONFIDENTIALITY NOTICE:** This electronic message is intended to be viewed only by the individual or entity to whom it is addressed. It may contain information that is privileged, confidential and exempt from disclosure under applicable law. Any dissemination, distribution or copying of this communication is strictly prohibited without our prior permission. If the reader of this message is not the intended recipient, or the employee or agent responsible for delivering the message to the intended recipient, or if you have received this communication in error, please notify us immediately by return e-mail and delete the original message and any copies of it from your computer and email system.

**From:** Juan R. Alvarez <Juan.Alvarez@AlvarezEng.com>

**Sent:** Wednesday, October 5, 2022 3:24 PM

**To:** Gloria Perez <gperez@sdsinc.org>; Ronald Galvis <rGalvis@sdsinc.org>; Ginger E. Wald <gwald@bclmr.com>

**Cc:** jeffmodernimage@bellsouth.net; Frances Ware <FWare@sdsinc.org>; Reynaldo Chinae <Reynaldo.Chinea@AlvarezEng.com>; Gabrielle Vitucci <gvitucci@sdsinc.org>

**Subject:** RE: TAM: 1860 SW 155 Avenue - owner possesses documentation (pictures attached and physical evidence) removing trees poses unacceptable risk

Attached is a photo of the subject property taken during our inspection conducted yesterday. The coconut trees are clearly planted inside CDD property.

It does not appear that the rear of the private property is graded in accordance with the permitted paving and grading plans to provide a 1-foot-high berm in the back to stop stormwater from draining from the private property onto the lake side slope for water quality purposes and to prevent erosion and avoid displacement of soil.



Juan R. Alvarez, P.E.

(305) 640-1345

[Juan.Alvarez@alvarezeng.com](mailto:Juan.Alvarez@alvarezeng.com)

**From:** Gloria Perez <gperez@sdsinc.org>

**Sent:** Monday, October 3, 2022 8:56 AM

**To:** Ronald Galvis <rGalvis@sdsinc.org>; Ginger E. Wald <gwald@bclmr.com>; Juan R. Alvarez <Juan.Alvarez@AlvarezEng.com>

**Cc:** jeffmodernimage@bellsouth.net; Frances Ware <FWare@sdsinc.org>; Reynaldo Chinae <Reynaldo.Chinea@AlvarezEng.com>; Gabrielle Vitucci <gvitucci@sdsinc.org>

**Subject:** RE: TAM: 1860 SW 155 Avenue - owner possesses documentation (pictures attached and physical evidence) removing trees poses unacceptable risk

Ginger we can add this to the upcoming meeting agenda and Ronald please advise this person of the meeting date and location noting this will be brought before the Board of Supervisors for discussion and direction and that this is a public meeting they are able to attend if they would like to approach the Board.

Ronald forward Gabrielle all letters and communications to be included in the meeting materials.

Thank you,



1860 SW 155 Avenue - owner possesses documentation (pictures attached and physical evidence) removing trees poses unacceptable risk

GRISELLE MARINO <gmarino13@outlook.com>

Fri 9/30/2022 6:16 PM

To: Ronald Galvis <rGalvis@sdsinc.org>;Gloria Perez <gperez@sdsinc.org>

Cc: mike chavez <mike29way@hotmail.com>

Ronald Galvis

Field Operations Manager

Trails at Monterey Community Development District

Hello Mr. Galvis:

Per the telephone conversation from Martha Chavez yesterday, please note the owners of the property located at 1860 SW 155 Avenue, Miami, Florida, oppose to the trees being removed in the first week of October as your letter indicates.

As mentioned during that phone call, when the current owners purchased the property in 2017, the trees were small and now that they have grown, they became an issue. The owners, Martha and Miguel Chavez, apologize in the name of the previous owner for planting trees without your authorization. Ever since they bought the property, they pay for a gardener/landscaping service to go every two weeks to maintain the property looking beautiful.

The current owners also wanted to build a pool in the backyard but the company that went for the estimate advise against it, as per the photos attached the concrete is separating and the fence height is higher on one side than the other indicating a slant on the pavement/foundation of the property. The engineer explained **the roots of those trees were helping to hold the property in place and preventing it from slanting more towards the Lake.** They assume that is the reason the previous owners planted them.

As you know, Miami is built over a swamp and after the incident in Surfside, we are more than ever cautious of similar tragedies taking place. The owners ask that you go inspect the property in person and look at the damage created and **hold on** the cutting/removal of the trees until everyone is sure **beyond reasonable doubt** that the safety of the residents of the property which include an elementary school child is not compromised "just to follow protocol or policy".

Additionally, County and State representatives have been contacted and there is the legislation below and accompanying bills on the subject. All the family want is additional time to make sure the removal of the tree will not pose unacceptable risk as the bill reads.

The family has not contacted the media as the idea is to resolve this matter in a civil fashion. Once again, the current owners are deeply sorry those trees were planted by the previous owner without your permission. The concern is **SAFETY** before anything.

You may reach owner Miguel Chavez at 786 217 5224.

Thank you very much,

Griselle Marino

On behalf of Miguel and Martha Chavez

From: @miamidade.gov>

To: christopher.zegarra@myfloridahouse.gov Zegarra <christopher.zegarra@myfloridahouse.gov>

Subject: The trees were planted by previous owner and we were told their roots are protecting the property from inclining more towards the lake

**General Bill** by McClain (CO-SPONSORS) Morales; Salzman

**Private Property Rights to Prune, Trim, and Remove Trees:** Prohibits local governments from requiring notice, application, approval, permit, fee, or mitigation for pruning, trimming, or removal of tree on residential property if property owner possesses certain documentation; provides that tree poses unacceptable risk if removal is only means of practically mitigating its risk below moderate as determined by specified procedures.

**Effective Date:** July 1, 2022

**Last Event:** Companion bill(s) passed, see CS/SB 518 (Ch. 2022-121) on Monday, March 7, 2022 2:14 PM; HB Laid on Table

**Lobbyist Disclosure Information**

## Referred Committees and Committee Actions

### House Referrals

- **Civil Justice & Property Rights Subcommittee**

- On agenda for: 01/27/22 8:00 AM

[View NoticeMeeting PacketsAction Packets](#)

- Favorable (final action)[View Meeting AppearancesSee Votes](#)

- **Local Administration & Veterans Affairs Subcommittee**

- On agenda for: 02/07/22 1:30 PM

[View NoticeMeeting PacketsAction Packets](#)

- Favorable (final action)[View Meeting AppearancesSee Votes](#)

- **Judiciary Committee**

- On agenda for: 02/21/22 3:30 PM

o Favorable (final action) [View Meeting Appearances](#) [See Votes](#)

## Related Bills

Bill #	Subject	Relationship
<a href="#">CS/SB 518</a>	Private Property Rights to Prune, Trim, and Remove Trees	Identical

## Bill Text

- [Original Filed Version](#)

## Staff Analysis

Chamber	Committee
House	<a href="#">Final Bill Analysis 6/2/2022 11:04:55 AM</a>
House	<a href="#">Final Bill Analysis 3/23/2022 8:44:04 AM</a>
House	<a href="#">Judiciary Committee 2/21/2022 7:58:55 PM</a>
House	<a href="#">Judiciary Committee 2/17/2022 2:27:45 PM</a>
House	<a href="#">Local Administration &amp; Veterans Affairs Subcommittee 2/7/2022 5:09:56 PM</a>
House	<a href="#">Local Administration &amp; Veterans Affairs Subcommittee 2/3/2022 4:54:51 PM</a>
House	<a href="#">Civil Justice &amp; Property Rights Subcommittee 1/27/2022 1:43:54 PM</a>
House	<a href="#">Civil Justice &amp; Property Rights Subcommittee 1/25/2022 8:40:03 PM</a>

## Vote History

(No Votes Recorded)

## Bill History

Event	Time	Member	Committee	Ver
<i>H Laid on Table; companion bill(s) passed, see CS/SB 518 (Ch. 2022-121)</i>	03/07/2022 - 2:14 PM			—
<i>H Added to Second Reading Calendar</i>	02/21/2022 - 7:59 PM			—
<i>H Bill released to House Calendar</i>	02/21/2022 - 7:59 PM			—
H Reported out of Judiciary Committee	02/21/2022 - 7:59 PM	<a href="#">Judiciary Committee</a>		—
H Favorable by Judiciary Committee	02/21/2022 - 7:42 PM	<a href="#">Judiciary Committee</a>		—
H Added to Judiciary Committee agenda	02/17/2022 - 2:09 PM	<a href="#">Judiciary Committee</a>		—
H Now in Judiciary Committee	02/07/2022 - 5:22 PM	<a href="#">Judiciary Committee</a>		—
H Reported out of Local Administration & Veterans Affairs Subcommittee	02/07/2022 - 5:22 PM	<a href="#">Local Administration &amp; Veterans Affairs Subcommittee</a>		—
H Favorable by Local Administration & Veterans Affairs Subcommittee	02/07/2022 - 4:17 PM	<a href="#">Local Administration &amp; Veterans Affairs Subcommittee</a>		—
H Added to Local Administration & Veterans Affairs Subcommittee agenda	02/03/2022 - 3:51 PM	<a href="#">Local Administration &amp; Veterans Affairs Subcommittee</a>		—
H Now in Local Administration & Veterans Affairs Subcommittee	01/27/2022 - 1:45 PM	<a href="#">Local Administration &amp; Veterans Affairs Subcommittee</a>		—
H Reported out of Civil Justice & Property Rights Subcommittee	01/27/2022 - 1:45 PM	<a href="#">Civil Justice &amp; Property Rights Subcommittee</a>		—
H Favorable by Civil Justice & Property Rights Subcommittee	01/27/2022 - 1:38 PM	<a href="#">Civil Justice &amp; Property Rights Subcommittee</a>		—
H Added to Civil Justice & Property Rights Subcommittee agenda	01/25/2022 - 3:06 PM	<a href="#">Civil Justice &amp; Property Rights Subcommittee</a>		—
H Now in Civil Justice & Property Rights Subcommittee	01/16/2022 - 1:50 PM	<a href="#">Civil Justice &amp; Property Rights Subcommittee</a>		—
H Referred to Judiciary Committee	01/16/2022 - 1:50 PM	<a href="#">Judiciary Committee</a>		—
H Referred to Local Administration & Veterans Affairs Subcommittee	01/16/2022 - 1:50 PM	<a href="#">Local Administration &amp; Veterans Affairs Subcommittee</a>		—
H Referred to Civil Justice & Property Rights Subcommittee	01/16/2022 - 1:50 PM	<a href="#">Civil Justice &amp; Property Rights Subcommittee</a>		—
H 1st Reading	01/11/2022 - 9:25 PM			—
H Filed	01/11/2022 - 9:18 AM	<a href="#">McClain</a>		—

## Statutes Referenced by this Bill

Statute	Other Bill Citations
<a href="#">163.045</a>	<a href="#">SB 316</a> , <a href="#">CS/SB 518</a> , <a href="#">SB 1900</a> , <a href="#">HB 6025</a> , <a href="#">HB 6113</a>

*Trails at Monterey Community Development District  
C/O Special District Services, Inc.  
2501A Burns Road  
Palm Beach Gardens, FL 33410*

September 9, 2022

Miguel Chavez & Martha Chavez  
And/Or Current Property Owner  
1860 SW 155 Avenue  
Miami, Florida 33185

**SENT VIA CERTIFIED MAIL  
RETURN RECEIPT REQUESTED**

**RE: Courtesy Notice - Removal of Encroachments**

Dear Property Owner,

This letter is just a courtesy notice to inform you that the removal of the encroachments (clearly described in the previous correspondence - enclosed), has been schedule for the first week of October, 2022, weather permitting.

For further details please refer to the enclosed previous correspondence. Should you have any questions regarding this matter, please do not hesitate to contact me at 786-347-2711 or via email at [rgalvis@sdsinc.org](mailto:rgalvis@sdsinc.org).

Sincerely,

*Ronald Galvis*

Ronald Galvis  
Field Operations Manager for  
Trails at Monterey Community Development District

cc: Ginger E. Wald, Esq., Billing, Cochran, Lyles, Mauro & Ramsey, P.A. (*via email only*)  
Juan Alvarez, Alvarez Engineering (*via email only*)  
Jeff Bowie, Modern Image Landscape & Design (*via email only*)  
Gloria Perez, District Manager (*via email only*)



*Trails at Monterey Community Development District  
C/O Special District Services, Inc.  
2501A Burns Road  
Palm Beach Gardens, FL 33410*

August 4th, 2022

Miguel Chavez & Martha Chavez  
1860 SW 155 Avenue  
Miami, Florida 33185

**SENT VIA CERTIFIED MAIL  
RETURN RECEIPT REQUESTED**

**RE: NOTICE OF ENCROACHMENT REMOVAL**

Dear Property Owner,

This firm serves as District Manager for the Trails at Monterey Community Development District (the “District”). Based on the correspondence sent to you on April 22nd, 2022, by the District Counsel (copy attached), regarding your property located at 1860 SW 155 Avenue, which is located within the District, we are sending you this courtesy notice to inform you that the District will schedule the removal of the encroachments (palms) and resodding of the area, for the week that starts on Monday August 29<sup>th</sup>, 2022, weather permitting.

For further information, specifics and details, please refer to the letter sent to you by the District’s counsel (attached) back on April 22<sup>nd</sup>, 2022.

If you remove the palms and resod the area prior to the mentioned date, you should immediately contact the District Manager, Gloria Perez, or Field Operations Manager Ronald Galvis at 786-347-2711 or via email at [gperez@sdsinc.org](mailto:gperez@sdsinc.org) and [rgalvis@sdsinc.org](mailto:rgalvis@sdsinc.org) to advise of the removal and inspection thereof to avoid any further costs.

Sincerely,

*Gloria Perez*

Gloria Perez  
District Manager for  
Trails at Monterey Community Development District

cc: Ginger E. Wald, Esq., Billing, Cochran, Lyles, Mauro & Ramsey, P.A. (*via email only*)  
Juan Alvarez, Alvarez Engineering (*via email only*)  
Jeff Bowie, Modern Image Landscape & Design (*via email only*)  
Ronald Galvis, Field Operations Manager (*via email only*)

*Trails at Monterey Community Development District  
C/O Special District Services, Inc.  
2501A Burns Road  
Palm Beach Gardens, FL 33410*

ENCLOSURES



LAW OFFICES

**BILLING, COCHRAN, LYLES, MAURO & RAMSEY, P.A.**

ESTABLISHED 1977

DENNIS E. LYLES  
JOHN W. MAURO  
KENNETH W. MORGAN, JR.  
BRUCE M. RAMSEY  
RICHARD T. WOULFE  
CAROL J. HEALY GLASGOW  
MICHAEL J. PAWELCZYK  
ANDREW A. RIEF  
MANUEL R. COMRAS  
SHIRLEY A. DeLUNA  
MARK A. RUTLEDGE  
GINGER E. WALD  
JEFFERY R. LAWLEY  
DONNA M. KRUSBE  
SCOTT C. COCHRAN  
SHAWN B. McKAMEY

LAS OLAS SQUARE, SUITE 600  
515 EAST LAS OLAS BOULEVARD  
FORT LAUDERDALE, FLORIDA 33301  
(954) 764-7150  
FAX: (954) 764-7279

CENTURION TOWER  
1601 FORUM PLACE, SUITE 400  
WEST PALM BEACH, FLORIDA 33401  
(561) 659-5970  
FAX: (561) 659-6173

WWW.BILLINGCOCHRAN.COM

PLEASE REPLY TO: FORT LAUDERDALE

CAMILLE E. BLANTON  
CHRISTINE A. BROWN  
GREGORY F. GEORGE  
BRAD J. KIMBER  
JOHN C. WEBBER

OF COUNSEL  
CLARK J. COCHRAN, JR.  
SUSAN F. DELEGAL  
GERALD L. KNIGHT

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

April 21, 2022

**Via U.S. Mail (Certified Registered Return Receipt)**

Miguel and Martha Chavez  
1860 SW 155 Avenue  
Miami, Florida 33185

**RE: Trails at Monterey Community Development District  
Our File No. 812.06090**

Dear Mr. and Mrs. Chavez:

This firm serves as District Counsel for the Trails at Monterey Community Development District. I am writing as a follow up to correspondence to you dated April 19, 2021 and December 2, 2020, respectively (see attached), regarding your property located at 1860 SW 155<sup>th</sup> Avenue, which is located within the Trails at Monterey Community Development District ("District"). Despite notice and extensions of time granted by the District for you to remove the palms encroaching on the District's property behind your home, you have failed to comply. The District Board of Supervisors has directed staff to obtain a contractor to remove the palms.

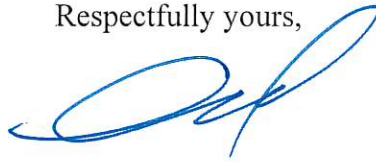
Attached please find the proposal from Modern Image Landscape & Design, the District's landscape contractor, in the amount of \$2,990.00 for removal of the aforementioned palms. The District's landscape contractor shall proceed with the palms removal within the next thirty (30) days. You are responsible for the costs associated with this palms removal. As a courtesy, the District shall invoice you directly for these costs when the work is completed. Should you fail to pay the District within ten (10) days after the date of the invoice, the District may seek legal action against you for the costs of removal, administrative fees, court costs and attorney's fees incurred by the District. Accordingly, your immediate attention to this matter is appropriate.

If you remove the palms and restore the area prior to the District's landscape contractor's arrival on District property to remove the palms, you should immediately contact the District

Miguel and Martha Chavez  
April 21, 2022  
Page 2

Manager, Gloria Perez, to advise of the removal and inspection thereof to avoid any further costs.

Respectfully yours,



GINGER E. WALD  
For the Firm

cc: Ms. Gloria Perez, District Manager

Enclosures as stated

# Modern Image Landscape & Design

3951 S.W. 47<sup>th</sup> Avenue, Suite 106

Davie, Florida 33314

Telephone (954) 316-7300

Fax (954) 316-8488

## Landscape Proposal

To: Trails of Monterey  
From: Jeff Bowie, Modern Image Landscape & Design  
Date: April 15, 2022  
Subject: Tree Removal – 1860 SW 155<sup>th</sup> Avenue

---

We are proposing to remove five Coconut Palms from behind 1860 SW 155<sup>th</sup> Avenue. These palms will be cut down and disposed of. We will then grind the stumps, replace any topsoil as necessary, and sod over the area. The cost comes to \$2,990.00.

If you would like for us to have this work performed, please email back a signed copy of this proposal. As always, please call me with any questions at (754) 264-3023.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

The above terms are valid only if approved within 90 days from the date of this proposal.

LAW OFFICES  
**BILLING, COCHRAN, LYLES, MAURO & RAMSEY, P.A.**  
ESTABLISHED 1977

DENNIS E. LYLES  
JOHN W. MAURO  
KENNETH W. MORGAN, JR.  
BRUCE M. RAMSEY  
RICHARD T. WOULFE  
CAROL J. HEALY GLASGOW  
MICHAEL J. PAWELCZYK  
ANDREW A. RIEF  
MANUEL R. COMRAS  
SHIRLEY A. DELUNA  
MARK A. RUTLEDGE  
GINGER E. WALD  
JEFFERY R. LAWLEY  
DONNA M. KRUSBE  
SCOTT C. COCHRAN  
SHAWN B. MCKAMEY

LAS OLAS SQUARE, SUITE 600  
515 EAST LAS OLAS BOULEVARD  
FORT LAUDERDALE, FLORIDA 33301  
(954) 764-7150  
FAX: (954) 764-7279

CENTURION TOWER  
1601 FORUM PLACE, SUITE 400  
WEST PALM BEACH, FLORIDA 33401  
(561) 659-5970  
FAX: (561) 659-6173

WWW.BILLINGCOCHRAN.COM

PLEASE REPLY TO: FORT LAUDERDALE

CAMILLE E. BLANTON  
CHRISTINE A. BROWN  
BRAD J. KIMBER  
VANESSA T. STEINERTS  
JOHN C. WEBBER

OF COUNSEL  
CLARK J. COCHRAN, JR.  
SUSAN F. DELEGAL  
GERALD L. KNIGHT

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

April 19, 2021

Miguel and Martha Chavez  
1860 SW 155<sup>th</sup> Avenue  
Miami, Florida 33185

**RE: Trails at Monterey Community Development District  
Our File No. 812.06090**

Dear Mr. and Mrs. Chavez:

This firm serves as District Counsel for the Trails at Monterey Community Development District. I am writing as a follow up to my correspondence to you dated December 2, 2020, regarding your property located at 1860 SW 155<sup>th</sup> Avenue, which is located within the Trails at Monterey Community Development District ("District"). The Trails at Monterey Community Development District Board of Supervisors has allowed for an extension of time for you to remove the trees, ornamentals, bushes and hardscape that are encroaching on the District's property behind your home. Please remove the trees that are planted on the District's property no later than ninety (90) days from the date of this letter.

I thank you for your prompt attention to this matter. If you have any questions or would like to discuss this matter further, please do not hesitate to contact Ms. Gloria Perez, District Manager for the Trails at Monterey Community Development District, at (786) 347-2711, ext. 2011.

Very truly yours,



VANESSA T. STEINERTS  
For the Firm

cc: Ms. Gloria Perez, District Manager

LAW OFFICES  
**BILLING, COCHRAN, LYLES, MAURO & RAMSEY, P.A.**

ESTABLISHED 1977

DENNIS E. LYLES  
JOHN W. MAURO  
KENNETH W. MORGAN, JR.  
BRUCE M. RAMSEY  
RICHARD T. WOULFE  
CAROL J. HEALY GLASGOW  
MICHAEL J. PAWELCZYK  
ANDREW A. RIEF  
MANUEL R. COMRAS  
SHIRLEY A. DeLUNA  
MARK A. RUTLEDGE  
GINGER E. WALD  
JEFFERY R. LAWLEY  
DONNA M. KRUSBE  
SCOTT C. COCHRAN  
SHAWN B. McKAMEY

LAS OLAS SQUARE, SUITE 600  
515 EAST LAS OLAS BOULEVARD  
FORT LAUDERDALE, FLORIDA 33301  
(954) 764-7150  
FAX: (954) 764-7279

CENTURION TOWER  
1601 FORUM PLACE, SUITE 400  
WEST PALM BEACH, FLORIDA 33401  
(561) 659-5970  
FAX: (561) 659-6173

WWW.BILLINGCOCHRAN.COM

PLEASE REPLY TO: FORT LAUDERDALE

CAMILLE E. BLANTON  
CHRISTINE A. BROWN  
BRAD J. KIMBER  
VANESSA T. STEINERTS  
JOHN C. WEBBER

OF COUNSEL  
CLARK J. COCHRAN, JR.  
SUSAN F. DELEGAL  
GERALD L. KNIGHT

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

December 2, 2020

Miguel and Martha Chavez  
1860 SW 155<sup>th</sup> Avenue  
Miami, Florida 33185

**RE: Trails at Monterey Community Development District  
Our File No. 812.06090**

Dear Mr. and Mrs. Chavez:

This firm serves as District Counsel for the Trails at Monterey Community Development District and I am writing because, according to the Miami-Dade County Property Appraiser's website, you are the owner of the property located at 1860 SW 155<sup>th</sup> Avenue, which is located within the Trails at Monterey Community Development District. The Trails at Monterey Community Development District has a five-member Board of Supervisors that consists of homeowners who live in the District, and who were elected by homeowners within the District. The Board has both budgetary and maintenance responsibilities for property located within the District.

It has come to the Board's attention that many of the homeowners whose homes abut the lakes within the District have planted trees, ornamentals, bushes and hardscapes on District property. Although you may not realize it, you do **not** own the property behind your property line extending down to the lake. As you can see from the Property Appraiser's website, the palm trees planted behind your home are outside your property line. The trees are encroaching upon the District's property, and their location interferes with the District's ability to maintain its property. Landscaping crews have been having a difficult time accessing the areas that need to be mowed around the lakes as a result of the obstructions. As such, they must be removed as soon as possible, but no later than sixty (60) days from the date of this letter. As the landowner, you are ultimately responsible for the alterations that have been made to the District's property.

Accordingly, the District hereby demands you to restore the Trails at Monterey Community Development District's property to its prior condition within sixty (60) days by removing the palm trees and restoring the slope to its prior condition. Further, this shall constitute a formal request that you cease and desist from any further alteration of the District's

Miguel and Martha Chavez  
December 2, 2020  
Page 2

property, or the District will have no other alternative but to commence legal action. Please advise, in writing, when the Trails at Monterey Community Development District's property has been restored to its prior condition, so that the property may be inspected.

I thank you for your prompt attention to the foregoing. If you have any questions or would like to discuss this matter further, please do not hesitate to contact Ms. Gloria Perez, District Manager for the Trails at Monterey Community Development District, at (786) 347-2711, ext. 2011.

Very truly yours,



VANESSA T. STEINERTS  
For the Firm

Enclosures

cc: Ms. Gloria Perez, District Manager

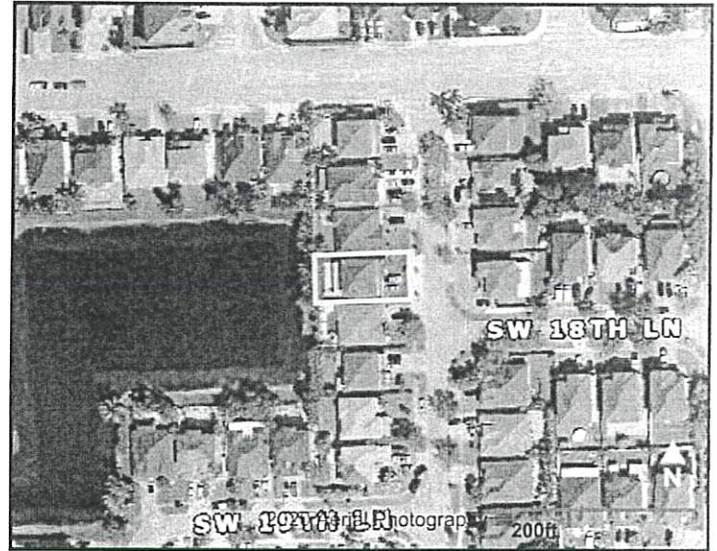


# OFFICE OF THE PROPERTY APPRAISER

## Summary Report

Generated On : 12/2/2020

Property Information	
Folio:	30-4909-004-2120
Property Address:	1860 SW 155 AVE Miami, FL 33185-5798
Owner	MIGUEL CHAVEZ MARTHA CHAVEZ
Mailing Address	1860 SW 155 AVE MIAMI, FL 33185 USA
PA Primary Zone	0102 MODIFIED SINGLE FAM RES
Primary Land Use	0105 RESIDENTIAL - SINGLE FAMILY : CLUSTER HOME
Beds / Baths / Half	4 / 2 / 0
Floors	2
Living Units	1
Actual Area	2,518 Sq.Ft
Living Area	2,028 Sq.Ft
Adjusted Area	2,102 Sq.Ft
Lot Size	5,000 Sq.Ft
Year Built	2004



Assessment Information			
Year	2020	2019	2018
Land Value	\$115,000	\$114,500	\$107,000
Building Value	\$196,537	\$177,157	\$179,217
XF Value	\$12,041	\$12,170	\$12,300
Market Value	\$323,578	\$303,827	\$298,517
Assessed Value	\$310,815	\$303,827	\$298,517

Benefits Information				
Benefit	Type	2020	2019	2018
Save Our Homes Cap	Assessment Reduction	\$12,763		
Homestead	Exemption	\$25,000	\$25,000	\$25,000
Second Homestead	Exemption	\$25,000	\$25,000	\$25,000

Note: Not all benefits are applicable to all Taxable Values (i.e. County, School Board, City, Regional).

Short Legal Description
EFM ESTATES SECTION TWO
PB 160-81 T-20946
LOT 20 BLK 21
LOT SIZE 5000 SQ FT
FAU 30-4909-000-0040-0950-1850

Taxable Value Information			
	2020	2019	2018
<b>County</b>			
Exemption Value	\$50,000	\$50,000	\$50,000
Taxable Value	\$260,815	\$253,827	\$248,517
<b>School Board</b>			
Exemption Value	\$25,000	\$25,000	\$25,000
Taxable Value	\$285,815	\$278,827	\$273,517
<b>City</b>			
Exemption Value	\$0	\$0	\$0
Taxable Value	\$0	\$0	\$0
<b>Regional</b>			
Exemption Value	\$50,000	\$50,000	\$50,000
Taxable Value	\$260,815	\$253,827	\$248,517

Sales Information			
Previous Sale	Price	OR Book-Page	Qualification Description
11/21/2016	\$360,000	30379-1031	Qual by exam of deed
03/17/2011	\$240,000	27624-2702	Qual by exam of deed
08/19/2009	\$100	27181-1408	Affiliated parties
11/01/2004	\$272,295	22835-0476	Sales which are qualified

The Office of the Property Appraiser is continually editing and updating the tax roll. This website may not reflect the most current information on record. The Property Appraiser and Miami-Dade County assumes no liability, see full disclaimer and User Agreement at <http://www.miamidade.gov/info/disclaimer.asp>

Version:



# PROPOSAL

Tel 786-694-0709

E-mail: [operations@raptorvac.com](mailto:operations@raptorvac.com)

[www.raptorvac.com](http://www.raptorvac.com)

## SIGNAGE INSTALL

<b>PROPOSAL SUBMITTED TO:</b> Trails at Monterey CDD	<b>PROJECT NAME:</b> Trails at Monterey
<b>BUSINESS ADDRESS:</b> 2501A Burns Road, Palm Beach Gardens, FL	<b>PROJECT LOCATION:</b> SW 8 Lane and SW 152 Avenue
<b>CONTACT:</b> Management/561-630-4922	<b>DATE:</b> August 30, 2022

We hereby propose to furnish all labor and equipment to complete the work outlined in this proposal in accordance with the Scope of Work listed below.

**SCOPE OF WORK:** All labor, materials and equipment to install one (1) R8-3a (No Parking) and one (1) R7-4 (No Standing Anytime) in High Intensity Prismatic Sheeting, two (2) galvanized u-channel posts, breakaway and concrete in accordance with locations and specifications provided.

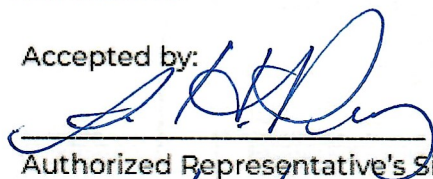
**COST:** We propose to conduct this work in accordance with the above Scope of Work for the sum of \$600.00.

**Six Hundred Dollars and 00/100 Cents**

**TERMS:** Net 30

**ACCEPTANCE:** Client hereby accepts and agrees to the terms, Scope of Work, and all other conditions and specifications hereinabove. Raptor Vac Systems is authorized to perform the work. Payment shall be made in accordance with the provisions contained hereinabove.

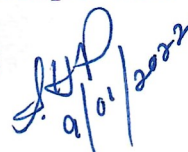
Accepted by:

  
Authorized Representative's Signature

9/01/2022  
Date of Acceptance

- Work to be conducted as specified on the attached Engineer specs.
- Work is not to commence until all required COI's have been provided.

Thank you  
Gloria Perez  
09/01/2022

  
9/01/2022



**RE: TAM Notice to Property Owner 15662 SW 8 LN**

Juan R. Alvarez &lt;Juan.Alvarez@AlvarezEng.com&gt;

Tue 8/30/2022 3:24 PM

To: Ronald Galvis &lt;rGalvis@sdsinc.org&gt;

Cc: Gloria Perez &lt;gperez@sdsinc.org&gt;

 3 attachments (5 MB)

R8-3a.pdf; R7-4.pdf; Location Map.pdf;

Ronald:

Please refer to the attachments. We recommend placing an R8-3a (No Parking) and R7-4 (No Standing Anytime) signs at the locations shown in the attached map. Both signs should meet MUTCD and be located 7-foot high with respect to the underside of the panel. Check for utilities before installing.

Thanks

**Juan R. Alvarez, P.E.**

(305) 640-1345

[Juan.Alvarez@alvarezeng.com](mailto:Juan.Alvarez@alvarezeng.com)

---

**From:** Ronald Galvis <rGalvis@sdsinc.org>**Sent:** Tuesday, August 30, 2022 8:52 AM**To:** Juan R. Alvarez <Juan.Alvarez@AlvarezEng.com>**Cc:** Gloria Perez <gperez@sdsinc.org>; Ronald Galvis <rGalvis@sdsinc.org>**Subject:** Fw: TAM Notice to Property Owner 15662 SW 8 LN

Good morning, dear Engineer Alvarez,

Please be advised that this homeowner, after receiving our letter regarding the signs they have installed on the District's premises, have reached out to us, and let us know that they are very concerned for the amount of people that is using this "entrance" area (property of the District), not only to park vehicles (very frequently, according to them), but also to access the lake to fishing and perform other activities.

Gloria has instructed me to reach out to you, in order to get your recommendation for what kind of signs (if it is allowed) the District can install to advise drivers and pedestrians that only authorized personal can park there (such as lake contractors, landscaping, me, etc.). Also, Gloria would like you to provide us with a specific location (is a sign is recommended) for it, where it does not block our vehicles' access.

For specific location, and details, please refer to the attachments.

Thanks for all your support, Mr. Alvarez. We will be very attentive to your prompt responses.

Have a wonderful rest of the week.



Map data ©2022, Map data ©2022 20 ft



**NO  
PARKING**

**33**

R8-3a

**NO  
STANDING  
ANY  
TIME**



**34**

R7-4

Trails At Monterey  
Community Development District

**Financial Report For  
September 2022**

**Trails At Monterey Community Development District**  
**Budget vs. Actual**  
**October 2021 through September 2022**

	<u>Oct 21 - Sept 22</u>	<u>21/22 Budget</u>	<u>\$ Over Budget</u>	<u>% of Budget</u>
<b>Income</b>				
363.100 · Administrative Assessments	60,906.21	60,654.00	252.21	100.42%
363.101 · Maintenance Assessments	34,186.05	34,186.00	0.05	100.0%
363.810 · Debt Assessments	219,415.20	219,413.00	2.20	100.0%
363.820 · Debt Assessment-Paid To Trustee	-209,169.90	-206,248.00	-2,921.90	101.42%
363.830 · Assessment Fees	-3,028.43	-6,285.00	3,256.57	48.19%
363.831 · Assessment Discounts	-11,648.12	-12,570.00	921.88	92.67%
369.401 · Interest Income	255.03	420.00	-164.97	60.72%
369.402 · Carryover From Prior Year	0.00	16,240.00	-16,240.00	0.0%
<b>Total Income</b>	<u>90,916.04</u>	<u>105,810.00</u>	<u>-14,893.96</u>	<u>85.92%</u>
<b>Gross Profit</b>	90,916.04	105,810.00	-14,893.96	85.92%
<b>Expense</b>				
511. · Professional Fees				
511.310 · Engineering	2,725.00	2,000.00	725.00	136.25%
511.315 · Legal Fees	7,442.00	10,500.00	-3,058.00	70.88%
511.320 · Audit Fees	3,500.00	3,500.00	0.00	100.0%
<b>Total 511. · Professional Fees</b>	<u>13,667.00</u>	<u>16,000.00</u>	<u>-2,333.00</u>	<u>85.42%</u>
511.122 · Payroll Tax Expense	137.70	400.00	-262.30	34.43%
511.131 · Supervisor Fee	1,800.00	5,000.00	-3,200.00	36.0%
511.301 · Aquatic/Stormwater Management	5,532.00	7,000.00	-1,468.00	79.03%
511.302 · Mitigation Maintenance	875.00	3,135.00	-2,260.00	27.91%
511.303 · Lake Easement/Landscaping	15,610.00	20,000.00	-4,390.00	78.05%
511.311 · Management Fees	30,600.00	30,600.00	0.00	100.0%
511.312 · Secretarial Fees	3,600.00	3,600.00	0.00	100.0%
511.314 · Website Management	750.00	750.00	0.00	100.0%
511.318 · Assessment/Tax Roll	6,000.00	6,000.00	0.00	100.0%
511.450 · Insurance	5,706.00	6,000.00	-294.00	95.1%
511.480 · Legal Advertisements	353.27	750.00	-396.73	47.1%
511.512 · Miscellaneous	470.13	1,600.00	-1,129.87	29.38%
511.513 · Postage and Delivery	220.97	325.00	-104.03	67.99%
511.514 · Office Supplies	396.40	625.00	-228.60	63.42%
511.540 · Dues, License & Subscriptions	175.00	175.00	0.00	100.0%
511.733 · Trustee Fees	4,256.13	3,500.00	756.13	121.6%
511.734 · Continuing Disclosure Fee	350.00	350.00	0.00	100.0%
<b>Total Expense</b>	<u>90,499.60</u>	<u>105,810.00</u>	<u>-15,310.40</u>	<u>85.53%</u>
<b>Net Income</b>	<u><u>416.44</u></u>	<u><u>0.00</u></u>	<u><u>416.44</u></u>	<u><u>100.0%</u></u>

**TRAILS AT MONTEREY COMMUNITY DEVELOPMENT DISTRICT  
MONTHLY FINANCIAL REPORT  
SEPTEMBER 2022**

	Annual Budget 10/1/21 - 9/30/22	Actual Sep-22	Year To Date Actual 10/1/21 - 9/30/22
<b>REVENUES</b>			
ADMINISTRATIVE ASSESSMENTS	60,654	0	60,906
MAINTENANCE ASSESSMENTS	34,186	0	34,186
DEBT ASSESSMENTS	219,413	0	219,415
OTHER REVENUES	0	0	0
INTEREST INCOME	420	0	255
<b>Total Revenues</b>	<b>\$ 314,673</b>	<b>\$ -</b>	<b>\$ 314,762</b>
<b>EXPENDITURES</b>			
<b>MAINTENANCE EXPENDITURES</b>			
AQUATIC/STORMWATER MANAGEMENT	7,000	520	5,532
MITIGATION MAINTENANCE	3,135	0	875
LAKE EASEMENT/LANDSCAPE MAINTENANCE	20,000	1,200	15,610
ENGINEERING/INSPECTIONS	2,000	0	2,725
<b>TOTAL MAINTENANCE EXPENDITURES</b>	<b>\$ 32,135</b>	<b>\$ 1,720</b>	<b>\$ 24,742</b>
<b>ADMINISTRATIVE EXPENDITURES</b>			
SUPERVISOR FEES	5,000	0	1,800
PAYROLL TAXES (EMPLOYER)	400	0	138
MANAGEMENT	30,600	2,550	30,600
SECRETARIAL	3,600	300	3,600
LEGAL	10,500	0	7,442
ASSESSMENT ROLL	6,000	6,000	6,000
AUDIT FEES	3,500	0	3,500
INSURANCE	6,000	0	5,706
LEGAL ADVERTISING	750	0	354
MISCELLANEOUS	1,600	46	470
POSTAGE	325	16	221
OFFICE SUPPLIES	625	7	396
DUES & SUBSCRIPTIONS	175	0	175
TRUSTEE FEES	3,500	0	4,256
CONTINUING DISCLOSURE FEE	350	350	350
WEBSITE MANAGEMENT	750	62	750
<b>TOTAL ADMINISTRATIVE EXPENDITURES</b>	<b>\$ 73,675</b>	<b>\$ 9,331</b>	<b>\$ 65,758</b>
<b>TOTAL EXPENDITURES</b>	<b>\$ 105,810</b>	<b>\$ 11,051</b>	<b>\$ 90,500</b>
<b>REVENUES LESS EXPENDITURES</b>	<b>\$ 208,863</b>	<b>\$ (11,051)</b>	<b>\$ 224,262</b>
BOND PAYMENTS	(206,248)	-	(209,170)
<b>BALANCE</b>	<b>\$ 2,615</b>	<b>\$ (11,051)</b>	<b>\$ 15,092</b>
COUNTY APPRAISER & TAX COLLECTOR FEE	(6,285)	0	(3,028)
DISCOUNTS FOR EARLY PAYMENTS	(12,570)	0	(11,648)
<b>EXCESS/ (SHORTFALL)</b>	<b>\$ (16,240)</b>	<b>\$ (11,051)</b>	<b>\$ 416</b>
CARRYOVER FROM PRIOR YEAR	16,240	0	0
<b>NET EXCESS/ (SHORTFALL)</b>	<b>\$ -</b>	<b>\$ (11,051)</b>	<b>\$ 416</b>
<b>Bank Balance As Of 9/30/22</b>	<b>\$ 233,767.61</b>		
<b>Accounts Payable As Of 9/30/22</b>	<b>\$ 11,928.98</b>		
<b>Accounts Receivable As Of 9/30/22</b>	<b>\$ -</b>		
<b>Available Funds As Of 9/30/22</b>	<b>\$ 221,838.63</b>		

**Trails At Monterey Community Development District**  
**Check Register**  
**May 2022 - September 2022**

<u>Check #</u>	<u>Date</u>	<u>Vendor</u>	<u>Amount</u>
5-1	5/4/2022	Allstate Resource Management, Inc.	707.00
5-2	5/4/2022	Alvarez Engineers, Inc.	300.00
5-3	5/4/2022	Modern Image Landscape & Design	1,200.00
5-4	5/4/2022	Special District Services, Inc.	3,021.76
6-1	6/8/2022	Allstate Resource Management, Inc.	520.00
6-2	6/8/2022	ALM Media, LLC	174.26
6-3	6/8/2022	Billing, Cochran, Lyles, Mauro & Ramsey	1,935.00
6-4	6/8/2022	Crespo Lawn Service, Inc	375.00
6-5	6/8/2022	Grau and Associates	3,500.00
6-6	6/8/2022	Modern Image Landscape & Design	1,340.00
6-7	6/8/2022	Special District Services, Inc.	3,011.23
6-8	6/8/2022	U.S. Bank (Tax Receipts)	6,185.50
7-1	7/6/2022	ALM Media, LLC	77.43
7-2	7/7/2022	Allstate Resource Management, Inc.	520.00
7-3	7/7/2022	Billing, Cochran, Lyles, Mauro & Ramsey	877.50
7-4	7/7/2022	Modern Image Landscape & Design	1,895.00
7-5	7/7/2022	Special District Services, Inc.	3,094.51
7-6	7/7/2022	U.S. Bank (Tax Receipts)	1,943.90
8-1	8/2/2022	Allstate Resource Management, Inc.	520.00
8-2	8/2/2022	Alvarez Engineers, Inc.	975.00
8-3	8/2/2022	Billing, Cochran, Lyles, Mauro & Ramsey	400.00
8-4	8/2/2022	Modern Image Landscape & Design	1,200.00
8-5	8/2/2022	Special District Services, Inc.	2,970.36
8-6	8/2/2022	U.S. Bank (Tax Receipts)	2,604.60
8-7	8/2/2022	U.S. Bank (Trustee Fees)	4,256.13
9-1	9/2/2022	Allstate Resource Management, Inc.	500.00
9-2	9/2/2022	Alvarez Engineers, Inc.	1,000.00
9-3	9/2/2022	Billing, Cochran, Lyles, Mauro & Ramsey	400.00
9-4	9/2/2022	Modern Image Landscape & Design	1,200.00
9-5	9/2/2022	Special District Services, Inc.	2,939.00
<b>TOTAL</b>			<b>49,643.18</b>



**TRAILS AT MONTEREY CDD  
TAX COLLECTIONS  
2021-2022**

#	ID#	PAYMENT FROM	DATE	FOR	Tax Collect Receipts	Interest Received	Commissions Paid	Discount	Net From Tax Collector	Admin. Assessment Income (Before Discounts & Fee)	Maint Assessment Income (Before Discounts & Fee)	Debt Assessment Income (Before Discounts & Fee)	Admin. Assessment Income (After Discounts & Fee)	Maint Assessment Income (After Discounts & Fee)	Debt Assessment Income (After Discounts & Fee)	Debt Assessments Paid to Trustee
									<b>\$314,253.00</b>	<b>\$60,654.00</b>	<b>\$34,186.00</b>	<b>\$ 219,413.00</b>	<b>\$60,654.00</b>	<b>\$34,186.00</b>	<b>\$ 219,413.00</b>	
									<b>\$295,398.00</b>	<b>\$57,015.00</b>	<b>\$32,135.00</b>	<b>\$ 206,248.00</b>	<b>\$57,015.00</b>	<b>\$32,135.00</b>	<b>\$ 206,248.00</b>	<b>206,248.00</b>
1	1	Miami-Dade Tax Collector	12/13/21	NAV Taxes	\$ 196,602.49		\$ (1,887.12)	\$ (7,890.97)	\$ 186,824.40	\$ 37,944.24	\$ 21,390.35	\$ 137,267.90	\$ 36,057.00	\$ 20,326.50	\$ 130,440.90	\$ 130,440.90
2	2	Miami-Dade Tax Collector	12/13/21	NAV Taxes	\$ 70,840.28		\$ (680.06)	\$ (2,833.57)	\$ 67,326.65	\$ 13,673.24	\$ 7,707.06	\$ 49,459.98	\$ 12,995.05	\$ 7,324.80	\$ 47,006.80	\$ 47,006.80
3	3	Miami-Dade Tax Collector	01/04/22	NAV Taxes	\$ 16,579.64		\$ (159.39)	\$ (640.55)	\$ 15,779.70	\$ 3,200.12	\$ 1,803.78	\$ 11,575.74	\$ 3,045.90	\$ 1,716.70	\$ 11,017.10	\$ 11,017.10
4	4	Miami-Dade Tax Collector	01/18/22	NAV Taxes	\$ 4,151.91		\$ (40.33)	\$ (119.07)	\$ 3,992.51	\$ 801.26	\$ 451.75	\$ 2,898.90	\$ 770.46	\$ 434.40	\$ 2,787.65	\$ 2,787.65
5	5	Miami-Dade Tax Collector	02/28/22	NAV Taxes	\$ 5,275.34		\$ (51.71)	\$ (105.49)	\$ 5,118.14	\$ 1,018.22	\$ 573.93	\$ 3,683.19	\$ 987.84	\$ 556.80	\$ 3,573.50	\$ 3,573.50
6	Int -1	Miami-Dade Tax Collector	02/28/22	Interest		\$ 10.39			\$ 10.39	\$ 10.39			\$ 10.39			\$ -
7	6	Miami-Dade Tax Collector	03/07/22	NAV Taxes	\$ 5,275.34		\$ (52.23)	\$ (52.77)	\$ 5,170.34	\$ 1,018.22	\$ 573.93	\$ 3,683.19	\$ 997.89	\$ 562.50	\$ 3,609.95	\$ 3,609.95
8	7	Miami-Dade Tax Collector	04/12/22	NAV Taxes	\$ 8,954.26		\$ (89.47)	\$ (5.70)	\$ 8,859.09	\$ 1,728.11	\$ 974.25	\$ 6,251.90	\$ 1,709.74	\$ 963.85	\$ 6,185.50	\$ 6,185.50
9	Int -2	Miami-Dade Tax Collector	04/27/22	Interest		\$ 1.97			\$ 1.97	\$ 1.97			\$ 1.97			\$ -
10	8	Miami-Dade Tax Collector	05/06/22	NAV Taxes/Interest	\$ 361.20	\$ 10.84	\$ (3.72)		\$ 368.32	\$ 80.54	\$ 39.30	\$ 252.20	\$ 79.72	\$ 38.90	\$ 249.70	\$ 249.70
11	9	Miami-Dade Tax Collector	06/07/22	NAV Taxes/Interest	\$ 2,450.98	\$ 50.92	\$ (25.02)		\$ 2,476.88	\$ 523.90	\$ 266.70	\$ 1,711.30	\$ 518.63	\$ 264.05	\$ 1,694.20	\$ 1,694.20
12	10	Miami-Dade Tax Collector	07/05/22	NAV Taxes/Interest (TC)	\$ 3,768.10	\$ 169.55	\$ (39.38)		\$ 3,898.27	\$ 901.75	\$ 405.00	\$ 2,630.90	\$ 892.72	\$ 400.95	\$ 2,604.60	\$ 2,604.60
13	Int -3	Miami-Dade Tax Collector	08/09/22	Interest		\$ 4.25			\$ 4.25	\$ 4.25			\$ 4.25			\$ -
14									\$ -							\$ -
15									\$ -							\$ -
					<b>\$ 314,259.54</b>	<b>\$ 247.92</b>	<b>\$ (3,028.43)</b>	<b>\$ (11,648.12)</b>	<b>\$ 299,830.91</b>	<b>\$ 60,906.21</b>	<b>\$ 34,186.05</b>	<b>\$ 219,415.20</b>	<b>\$ 58,071.56</b>	<b>\$ 32,589.45</b>	<b>\$ 209,169.90</b>	<b>\$ 209,169.90</b>

Assessment Roll = \$314,259.54

Note: \$314,253, \$60,654, \$34,186 and \$219,413 are 2021/2022 Budgeted assessments before discounts and fees.  
\$295,398, \$57,015, \$32,135 and \$206,248 are 2021/2022 Budgeted assessments after discounts and fees.

\$ 314,259.54	
\$ 247.92	\$ 299,830.91
\$ (60,906.21)	\$ (58,071.56)
\$ (34,186.05)	\$ (32,589.45)
\$ (219,415.20)	\$ (209,169.90)
\$ -	\$ -

June 8, 2022

Ms. Gloria Perez  
District Manager  
Trails at Monterey Community Development District  
Special District Services, Inc.  
The Oaks Center  
2501A Burns Road  
Palm Beach Gardens, FL 33410

**Re: Year 2022 Trails at Monterey CDD Report**

Dear Ms. Perez:

The intent of this report is fourfold: 1) To inform as to the status of ownership of the infrastructure that was financed or constructed by the District; 2) To describe the state, working order and condition of the infrastructure still owned by the District; 3) To give recommendations as to the funds estimated necessary for the proper maintenance, repair and operation of the District's infrastructure and; 4) To give recommendations as to the insurance to be carried by the District and the amount to be budgeted for premiums.

The District is located in Sections 4 and 9, Township 54S, Range 39E, in Miami-Dade County, Florida. It is generally bounded by Tamiami Trail (SW 8 Street, State Road 90, US-41) on the north, SW 157 Avenue on the west, SW 154 Avenue on the east, and SW 21 Street on the south; see exhibit 1 for the location and actual boundaries of the District. The District measures approximately 92.47 acres in area.

**1. Infrastructure Ownership**

*a. Roads*

i. All roads within the District have been dedicated to Miami-Dade County for the perpetual use of the public. This was accomplished by the recording of the following plats:

1. "E.F.M. Estates Section One" Recorded on March 6, 2003 in Miami-Dade County Plat Book 159, Page 98.
2. "E.F.M. Estates Section Two" Recorded on October 24, 2003 in Miami-Dade County Plat Book 160, Page 81.

*b. Stormwater Management System (See Exhibit 1)*

i. The road drainage system has been dedicated to Miami-Dade County for the perpetual use of the public by the recording of the plats described above.

- ii. The CDD owns and maintains five lakes, one dry retention area and two tree preservation tracts. Except for one half of a lake, which extends beyond the District boundary, as shown in Exhibit 1, all other lakes, retention and preservation tracts are located within the boundaries of the District. The tracts were conveyed to the District for ownership and maintenance through the following instruments:
    1. Onsite (within the CDD boundary):
      - a. Dry retention area: Tract A (PB 159, Pg 98). Quit Claim Deed OR BK 24857, Pg 2611.
      - b. Tree preservation areas: Tract D (PB 159, Pg 98). Quit Claim Deed OR BK 24857, Pg 2611 and Tract H, Quit Claim Deed OR BK 24857, Pg 2614.
      - c. Lakes: Tracts B, C, (PB 159, Pg 98). Quit Claim Deed OR BK 24857, Pg 2611 and Tracts J, K, L, M, N, P, Q and R (PB 160, Pg 81). Quit Claim Deed OR BK 24857, Pg 2614.
      - d. Lakes: Tracts F (lake tract), E (lake access tract) (PB 159, Pg 98). Quit Claim Deed OR BK 24857, Pg 2611. These two tracts constitute the “one half” onsite portion of the lake that, together with the tracts identified below, make up one whole lake.
    2. Offsite (outside the CDD boundary):
      - a. Lakes: Tracts S (lake tract) and T (lake access tract) (PB 161, Pg 42). Quit Claim Deed OR BK 24857, Pg 2617. These two tracts constitute the “one half” offsite portion of the lake that, together with the tracts identified above, make up one whole lake. This “one half” offsite portion of the lake is owned and maintained by the District.
    3. The South Florida Water Management District (SFWMD) was given a Deed of Conservation Easement over the two tree preservation tracts described above (OR BK 21637, Pg 3622). The SFWMD is not responsible for the maintenance of the tracts.
- c. Water Distribution System
- i. The water distribution system was conveyed complete and in good condition to Miami-Dade County Water and Sewer Department (WASD) for ownership and maintenance, under Agreement ID No. 17741 (recorded at Miami-Dade County Official Record Book 20309, page 0798, and ORB 22371, page 1025 for Addendum 1). A small easement was granted to WASD between SW 155<sup>th</sup> Court and SW 8<sup>th</sup> Street (ORB 24930 page 2511).

d. Sanitary Sewer System

- i. The sanitary sewer system and lift station were conveyed complete and in good condition to WASD for ownership and maintenance, under Agreement ID No. 17741 referenced above. Tract G of E.F.M. Estates Section One as recorded at Plat Book 159 page 98, was conveyed to MDWASD along with the lift station constructed on the property (SW 12 Terrace at SW 154 Avenue).

**2. State, Working Order and Condition of the Infrastructure within the District**

a. Roads

- i. The County-own roads are in good working order and condition.

Issues with the roads may be reported online to the Miami-Dade County Department of Public Works and Waste Management by following the link provided below:

<http://www.miamidade.gov/publicworks/report-problems.asp>

b. Stormwater Management System

- i. The water portion of the lakes are in good condition. Erosion on the banks of the lakes and loss of stabilizing grass should be monitored and addressed. Certain plantings by adjacent property owners in the lake banks may present impediments to CDD maintenance activities.

Road drainage complaints within the road right of ways may be reported online to the Miami-Dade County Department of Public Works and Waste Management by following the link provided below:

<https://www.miamidade.gov/environment/flood-complaints.asp>

c. Water Distribution System

- i. Water distribution system is in good working order and condition.

Issues may be reported to the County at either of the following numbers: 305-274-9272 (Emergencies) or 305-665-7477 (Customer Service).

**3. Estimated Maintenance Costs for District Owned Infrastructure**

a. General

- i. The CDD proposed 2022-2023 Fiscal Year budget has the following amounts for maintenance expenditures:

<b>2022-2023 Budget for Maintenance</b>	
Aquatics/Stormwater Management	\$7,350
Mitigation Maintenance	\$3,300
Lake Easement/Landscape Maintenance	\$22,000
Engineering/Inspections	\$2,500
<b>Total</b>	<b>\$35,150</b>

Alvarez Engineers finds the District’s proposed maintenance budget for Fiscal Year 2022-2023 adequate and enough.

For more detailed information on the 2022-2023 Fiscal Year Budget please visit the District’s website at the following link:

<https://trailsatmontereycdd.org/financials/>

*b. Roads*

- i. No maintenance costs are estimated since all the roads are owned and maintained by Miami-Dade County.

*c. Stormwater Management System*

- i. No maintenance costs are estimated for the road drainage since the road drainage system is owned and maintained by Miami-Dade County.
- ii. The District has budgeted funds for aquatic, mitigation, landscape and lake maintenance as indicated above.

*d. Water Distribution System*

- i. No maintenance costs are estimated since the water distribution system is owned and maintained by Miami-Dade County.

**4. Insurance**

Alvarez Engineers has reviewed the District’s general liability, hired non-owned auto, employment practices liability and public officials liability coverage insurance policy 100121066 provided by Florida Insurance Alliance for the period between October 1, 2021 and October 1, 2022. The District has budgeted enough funds to cover the \$5,706 insurance premium.

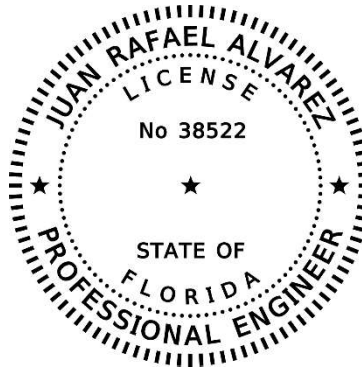
This report was prepared to the best of my knowledge and belief and is based on field observations conducted by Alvarez Engineers personnel, the District Engineer’s Report and public documents available. If you have any questions please do not hesitate to contact me at 305-640-1345 or at [Juan.Alvarez@Alvarezeng.com](mailto:Juan.Alvarez@Alvarezeng.com).

Sincerely,

Juan R Alvarez

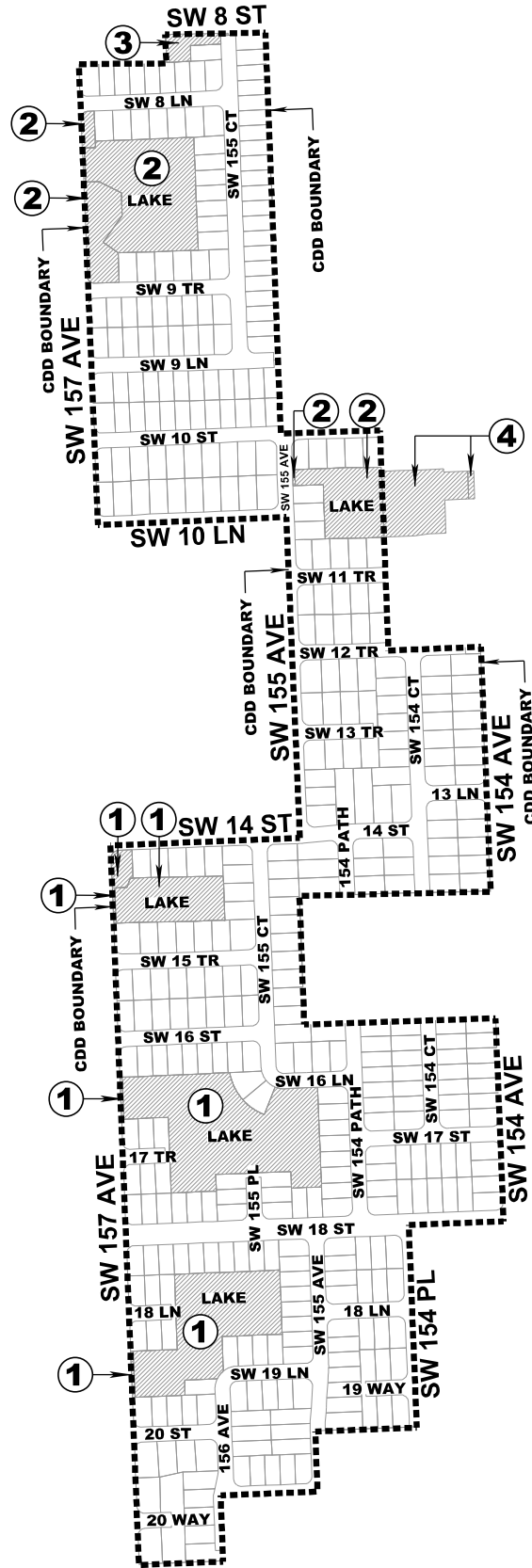
Digitally signed by Juan R  
Alvarez  
Date: 2022.06.08 11:50:26  
-04'00'

**Alvarez Engineers, Inc.**  
Juan R. Alvarez, PE  
District Engineer  
Date: June 8, 2022



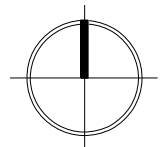
This item has been digitally signed and sealed by  
Juan R. Alvarez, PE on June 7, 2022.

Printed copies of this document are not  
considered signed and sealed and the signature  
must be verified on any electronic copies.



**CDD OWNERSHIP**

- ① TRACTS "H, J, K, L, M, N, P, Q AND R"  
(PB 160, PG 81)  
FOLIO 30-4909-004-2820  
ORB 24857, PG 2614  
CATEGORY: LAKES AND TREE  
PRESERVATION AREAS
- ② TRACTS "B, C, D, E, AND F"  
(PB 159, PG 98)  
FOLIO 30-4904-003-1380  
30-4904-003-1390  
30-4904-003-1420  
30-4904-003-1400  
30-4904-003-1410  
ORB 24857, PG 2611  
CATEGORY: LAKES AND TREE  
PRESERVATION AREAS
- ③ TRACTS "A" (PB 159, PG 98)  
FOLIO 30-4904-003-1370  
ORB 24857, PG 2611  
CATEGORY: DRY RETENTION AREA
- ④ TRACTS "S, T" (PB 161,42)  
FOLIO 30-4909-008-0270  
30-4909-008-0280  
ORB 24857, PG 2617  
CATEGORY: OUTSIDE CDD  
BOUNDARIES LAKE AND LAKE ACCESS



**ALVAREZ ENGINEERS, INC.**

**TRAILS AT MONTEREY CDD  
CDD LAND OWNERSHIP**

**TEMPLATE FOR LOCAL GOVERNMENTS AND SPECIAL DISTRICTS FOR PERFORMING A STORMWATER NEEDS ANALYSIS PURSUANT TO SECTION 5 OF SECTION 403.9302, FLORIDA STATUTES**

**INTRODUCTION**

As part of the 2021 regular session, the Legislature recognized the need for a long-term planning process for stormwater and wastewater. Section 403.9302, Florida Statutes, requires a 20-year needs analysis from the local governments providing stormwater services. Because this planning document is forward-looking, it will necessarily include a large number of assumptions about future actions. These assumptions should be based on any available information coupled with best professional judgment of the individuals completing the document.

Completing this template by June 30, 2022, will fulfill the statutory requirements for the first round of 20-year needs analyses for stormwater. The template was generated by EDR in cooperation with local governments, Special Districts, the Florida Department of Environmental Protection (DEP), the Water Management Districts, the Florida Stormwater Association, private consultants, and others. Use of this tool will help ensure that information is compiled consistently for the Office of Economic & Demographic Research's (EDR) report to the Legislature.

For the purposes of this document, a stormwater management program and a stormwater management system are as defined in statute (s. 403.031(15) and (16), F.S., respectively; language provided here: <https://www.flsenate.gov/Laws/Statutes/2021/403.031>). Plainly speaking, the "program" is the institutional framework whereby stormwater management activities (MS4 NPDES permit activities, and other regulatory activities, construction, operation and maintenance, etc. ) are carried out by the public authority. The "system" comprises the physical infrastructure that is owned and/or operated by the local government or special district that specifically is intended to control, convey or store stormwater runoff for treatment and flood protection purposes.

For the purposes of this document, the following guiding principles have been adopted:

- Stormwater systems or facilities owned and operated by any of the following are excluded from reporting requirements for local governments and special districts:
  - o Private entities or citizens
  - o Federal government
  - o State government, including the Florida Department of Transportation (FDOT)
  - o Water Management Districts
  - o School districts
  - o State universities or Florida colleges
- Local government expenditures associated with routine operation and maintenance are fully funded prior to commencing new projects and initiatives.
- Local government submissions will include the activities of dependent special districts. Only independent special districts report separately. For a list of all special districts in the state and their type (*i.e.*, dependent or independent), please see the Department of Economic Opportunity's Official List of Special Districts at the following link: <http://specialdistrictreports.floridajobs.org/webreports/alphalist.aspx>.
- With respect to federal and state statutes and rulemaking, current law and current administration prevails throughout the 20-year period. In other words, the state's present legal framework (*i.e.*, the status quo) continues throughout the period.



GENERAL INSTRUCTIONS FOR USING THE TEMPLATE

Instructions for submitting the template are still under development. Additional information regarding submission and answers to frequently asked questions will be posted on EDR's website, along with other useful materials, here: <http://edr.state.fl.us/Content/natural-resources/stormwaterwastewater.cfm>

The statutory language forms the titles for each part. This template asks that you group your recent and projected expenditures in prescribed categories. A detailed list of the categories is provided in part 5.0.

The same project should not appear on multiple tables in the jurisdiction's response unless the project's expenditures are allocated between those tables. All expenditures should be reported in \$1,000s (e.g., five hundred thousand dollars should be reported as \$500).

For any jurisdiction that is contracting with another jurisdiction where both could be reporting the same expenditure, please contact EDR for additional guidance. In situations where a reporting jurisdiction contracts with a non-reporting jurisdiction, (i.e., FDOT, the water management districts, the state or federal government), the reporting jurisdiction should include the expenditures.

When reporting cost information, please only include the expenditures that have flowed, are flowing, or will likely flow through your jurisdiction's budget. While necessary to comply with the statute, the concept of "future expenditures" should be viewed as an expression of identified needs.

**These projections are necessarily speculative and do not represent a firm commitment to future budget actions by the jurisdiction.**

This Excel workbook contains three worksheets for data entry. (Along the bottom of the screen, the three tabs are highlighted green.) Empty cells with visible borders are unlocked for data entry. In the first tab, titled "Background through Part 4," the information requested is either text, a dropdown list (e.g., Yes or No), or a checkbox. The next tab, "Part 5 through Part 8," contains tables for expenditure or revenue data as well as some follow-up questions that may have checkboxes, lists, or space for text.

In Part 5 and Part 6, the expenditure tables have space for up to 5 projects. More projects can be listed in the "Additional Projects" tab. This tab contains a table with space for up to 200 additional projects. In order for these additional projects and expenditures to be correctly classified and included in the final totals, each project must be assigned a Project Type and Funding Source Type from the dropdown lists in columns B and C.

Links to Template Parts:

[Background Information](#)

[Part 1](#)

[Part 2](#)

[Part 3](#)

[Part 4](#)

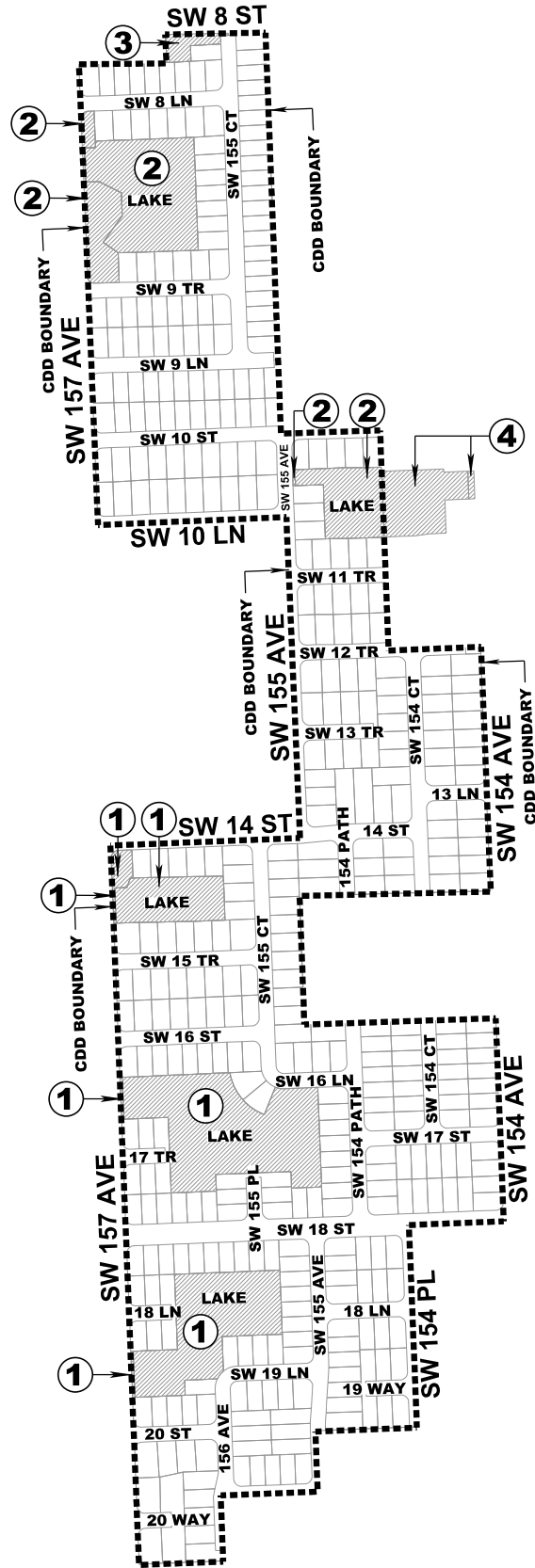
[Part 5](#)

[Part 6](#)

[Part 7](#)

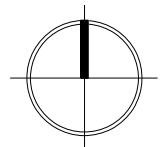
[Part 8](#)

[Additional Projects - This table contains additional rows for projects that do not fit into the main tables in Parts 5 and 6](#)



**CDD OWNERSHIP**

- ① TRACTS "H, J, K, L, M, N, P, Q AND R"  
(PB 160, PG 81)  
FOLIO 30-4909-004-2820  
ORB 24857, PG 2614  
CATEGORY: LAKES AND TREE  
PRESERVATION AREAS
- ② TRACTS "B, C, D, E, AND F"  
(PB 159, PG 98)  
FOLIO 30-4904-003-1380  
30-4904-003-1390  
30-4904-003-1420  
30-4904-003-1400  
30-4904-003-1410  
ORB 24857, PG 2611  
CATEGORY: LAKES AND TREE  
PRESERVATION AREAS
- ③ TRACTS "A" (PB 159, PG 98)  
FOLIO 30-4904-003-1370  
ORB 24857, PG 2611  
CATEGORY: DRY RETENTION AREA
- ④ TRACTS "S, T" (PB 161,42)  
FOLIO 30-4909-008-0270  
30-4909-008-0280  
ORB 24857, PG 2617  
CATEGORY: OUTSIDE CDD  
BOUNDARIES LAKE AND LAKE ACCESS



**ALVAREZ ENGINEERS, INC.**

**TRAILS AT MONTEREY CDD  
CDD LAND OWNERSHIP**

EXHIBIT 1