



**TRAILS AT MONTEREY  
COMMUNITY DEVELOPMENT  
DISTRICT**

**MIAMI-DADE COUNTY  
REGULAR BOARD MEETING  
& PUBLIC HEARING  
AUGUST 22, 2023  
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  
Call-In: 877-402-9753; Access ID: 8338134  
**REGULAR BOARD MEETING & PUBLIC HEARING**  
August 22, 2023  
6:30 p.m.

- A. Call to Order
- B. Proof of Publication.....Page 1
- C. Establish Quorum
- D. Introduction of the Trails at Monterey Community Development District.....Page 2
- E. Additions or Deletions to Agenda
- F. Comments from the Public for Items Not on the Agenda
- G. Approval of Minutes
  - 1. June 5, 2023 Special Board Meeting Minutes.....Page 3
- H. Old Business
  - 1. Discussion Regarding Lake Bank Restoration Project.....Page 6
- I. Public Hearing
  - 1. Proof of Publication.....Page 40
  - 2. Receive Public Comments on Fiscal Year 2023/2024 Final Budget.....Page 41
  - 3. Consider Resolution No. 2023-02 Adopting a Fiscal Year 2023/2024 Final Budget.....Page 53
- J. New Business
  - 1. Consider Resolution No. 2023-03 Adopting a Fiscal Year 2023/2024 Meeting Schedule.....Page 60
  - 2. Consider Resolution No. 2023-04 – Adopting a Records Retention Policy.....Page 62
  - 3. Consider Appointment of Audit Committee and Approval of Evaluation Criteria.....Page 66
- K. Administrative Matters
  - 1. Staff Report, as Required
- L. Board Member/Staff: Additional Comments/Requests
- M. Adjourn

MIAMI-DADE

STATE OF FLORIDA  
COUNTY OF MIAMI-DADE:

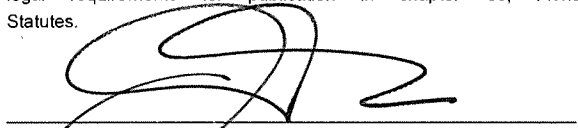
Before the undersigned authority personally appeared MARIA MESA, who on oath says that he or she is the LEGAL CLERK, Legal Notices of the Miami Daily Business Review f/k/ a Miami Review, a daily (except Saturday, Sunday and Legal Holidays) newspaper, published at Miami in Miami-Dade County, Florida;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

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

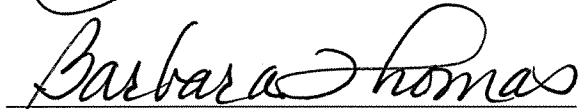
in the XXXX Court, was published in said newspaper by print in the issues of and/or by publication on the newspaper's website, if authorized, on

10/17/2022

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

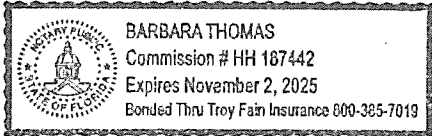


Sworn to and subscribed before me this 17 day of OCTOBER, A.D. 2022



(SEAL)

MARIA MESA personally known to me



**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

## **TRAILS AT MONTEREY COMMUNITY DEVELOPMENT DISTRICT INTRODUCTION**

Trails at Monterey Community Development District (the “District”) is a local unit of special-purpose government of the State of Florida established in accordance with the Uniform Community Development District Act of 1980, Chapter 190, Florida Statutes, as amended and by Ordinance No. 02-124 of the Board of County Commissioners of Miami Dade County, Florida (the “County”), effective July 9<sup>th</sup> 2002. District lands consist of approximately 92.47 gross acres within the County and were developed as a residential community which consists of 417 single family home dwellings units.

The District is governed by a five-member Board of Supervisors who are qualified electors (registered voters living within the boundaries of the District) elected during the general election process by qualified electors of the District. The District assessment on your tax bill is comprised of three (3) components, which are debt, administrative, and maintenance. The debt portion of the assessment is the payment of bonds that were sold in 2003 and refinanced in 2012 (the “2012 Bonds”), to finance the installation and construction costs of the public infrastructure within the District. The 2012 Bonds mature in May of 2033, and after the 2012 Bonds mature, the debt portion of the assessment will no longer apply on your assessment; however, the administrative and maintenance portions will still be part of your assessment. The public infrastructure installed and constructed with the bond funds consists of roads, water distribution system, sanitary sewer system, and the stormwater management system. Once construction was completed, the maintenance of the infrastructure was either dedicated to the District or it was dedicated to a separate local government. For this District, the maintenance of the roads, water distribution system, sanitary sewer system, and part of the stormwater management system were dedicated to Miami-Dade County for maintenance. The section of the stormwater management system that remains the responsibility of the District are five (5) lakes, a dry retention area and two tree preservation tracts.

**TRAILS AT MONTEREY COMMUNITY DEVELOPMENT DISTRICT  
SPECIAL BOARD MEETING  
JUNE 5, 2023**

**A. CALL TO ORDER**

Ms. Nguyen called the Trails at Monterey Community Development District (the “District”) Special Board Meeting of June 5, 2023, to order at 6:30 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**

Ms. Nguyen presented proof of publication that notice of the Special Board Meeting had been published in the *Miami Daily Business Review* on May 24, 2023, as legally required.

**C. ESTABLISH A QUORUM**

Ms. Nguyen stated that the attendance of Chairman Juan Sanhueza, Vice Chairman Carlos Delgado and Supervisors Olga Nadal and Andy Gonzalez constituted a quorum and it was in order to proceed with the meeting.

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

**D. ADDITIONS OR DELETIONS TO 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. April 25, 2023, Regular Board Meeting**

The minutes of the April 25, 2023, Regular Board Meeting were presented for approval.

There being no changes, a <b>MOTION</b> was made by Mr. Sanhueza, seconded by Mr. Delgado and unanimously passed approving the minutes of the April 25, 2023, Regular Board Meeting, as presented.
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**G. OLD BUSINESS**

**1. Discussion Regarding Request for Stay Submitted for Chavez Residence for Encroachment at 1860 SW 155<sup>th</sup> Avenue**

Ms. Nguyen stated that she followed-up with Mr. Miguel Chavez and Ms. Grisselle Marino (Mr. Chavez’ representative) regarding the extension of time granted by the Board to Mr. Chavez to provide an engineer’s report documenting Mr. Chavez’ claims that the trees encroaching on the District’s lake bank should not be removed. Ms. Nguyen stated that she did not receive a response from Mr. Chavez or Ms. Marino, nor had

her offices received the engineer's report. The Board consensus is to wait until the report from Landshore Enterprises is received and then make a decision on the Chavez residence.

## **2. Discussion Regarding Bond Options for Lake Bank Restoration Project**

This item was discussed during item H. 1.

### **H. NEW BUSINESS**

#### **1. Consider Resolution No. 2023-01 – Adopting a Fiscal Year 2023/2024 Proposed Budget**

Ms. Nguyen presented Resolution No. 2023-01, entitled:

#### **RESOLUTION NO. 2023-01**

#### **A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE TRAILS AT MONTEREY COMMUNITY DEVELOPMENT DISTRICT APPROVING A PROPOSED BUDGET FOR FISCAL YEAR 2023/2024; AND PROVIDING AN EFFECTIVE DATE.**

Ms. Nguyen explained that in light of the lake bank restoration project being considered by the Board, an increase in assessments would be required. Ms. Nguyen reminded the Board that the approximate cost of the restoration project has been set at \$1,200,000. Ms. Nguyen provided four (4) Proposed Budget scenarios. Scenario 1 keeps the budget the same as Fiscal Year 2022/2023, with no increases in assessments, but with insufficient funds to complete the lake bank restoration project. Scenario 2 provides for funding the project in one year, directly through assessment increases in the amount of approximately \$3,118. Scenario 3 provides for funding the project in two years, directly through assessment increases in the amount of approximately \$1,588. Scenario 4 provides for funding the project through the proceeds of a twenty (20) year bond, which would increase assessments by approximately \$369. Board members were reminded that any increase in assessments would require that a letter be sent to all property owners advising of the assessment increase. Additionally, as part of Resolution No. 2023-01, the Board must set a date for the Public Hearing to adopt the fiscal year 2023/2024 final budget and assessment role. Ms. Nguyen explained that the lake bank engineering study report should be completed by the time the Public Hearing is held and that the report will be able to give the Board a better gage of the required increase in assessments. A discussion ensued, after which:

A **MOTION** was made by Mr. Delgado, seconded by Mr. Gonzalez and unanimously passed and unanimously passed to approve and adopt Resolution No. 2023-01 Scenario 3, *as amended* (decreasing the Erosion Control Shoreline Restoration budget line from \$600,000 to \$450,000), setting the public hearing to adopt the fiscal year 2023/2024 final budget and assessments for August 22, 2023, at 6:30 p.m. in the Kendall Executive Center located at 8785 SW 165 Avenue, Suite 200, Miami, Florida 33193; and further authorizes publication/notice of the budget public hearing, as required by law.

Ms. Nguyen stated that she will forward the lake bank engineering study report once she receives it. Once that report is received, the Board will be able to determine if bonds will be required for the funding of the lake bank restoration project.

### **I. ADMINISTRATIVE MATTERS**

#### **1. Financial Update**

Ms. Nguyen presented the monthly financial statements presented in the meeting book. Available funds as of May 31, 2023, were \$245,738.33.

**2. Statement of Financial Interest 2022 Form 1 - Filing Deadline: July 1, 2023**

Board members were reminded of the importance of completing and mailing to the Supervisor of Elections within the County of residency their individual 2022 Statement of Financial Interests Form 1. The deadline for submittal is July 1, 2023.

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

There were no closing comments from Board Members.

Ms. Nguyen stated that unless an emergency were to arise, the Board would not need to meet until August 22, 2023.

**K. ADJOURNMENT**

There being no further business to come before the Board, a **MOTION** was made by Mr. Gonzalez, seconded by Ms. Nadal adjourning the meeting at 7:14 p.m. The **MOTION** carried unanimously.

**ATTESTED BY:**

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

\_\_\_\_\_  
Chair/Vice Chair



# Landshore Enterprises, LLC

Streambank & Shoreline protection/stabilization/reclamation  
Environmental Engineering, Erosion Control, Construction Management  
d/b/a Erosion Restoration, LLC

## Technical Engineering Memorandum Trails at Monterey Community Development District 2501A Burns Road, Palm Beach Gardens, Florida 33410



Submitted via email:  
July 18, 2023





# Landshore Enterprises, LLC

*Streambank & Shoreline protection/stabilization/reclamation  
Environmental Engineering, Erosion Control, Construction Management  
d/b/a Erosion Restoration, LLC*

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## Introduction – Trails at Monterey Community Development District:

Trails at Monterey Community Development District (the “District”) which is a local unit of special-purpose government of the State of Florida established in accordance with the Uniform Community Development District Act of 1980, Chapter 190, Florida Statutes. District lands consist of approximately 92.47 gross acres within the County and were developed as a residential community which consists of single-family home dwellings totaling 417 units.

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

The District is one of Miami-Dade County’s Community Development Districts and owns the five lakes.

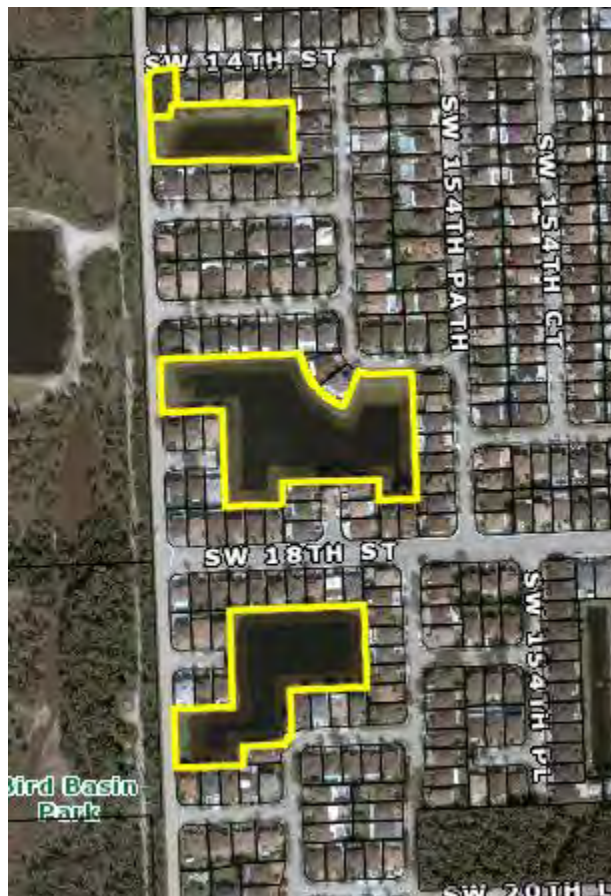


Figure 1: Lakes 1, 2, and 3 aerials from Miami-Dade County Property Appraiser Records



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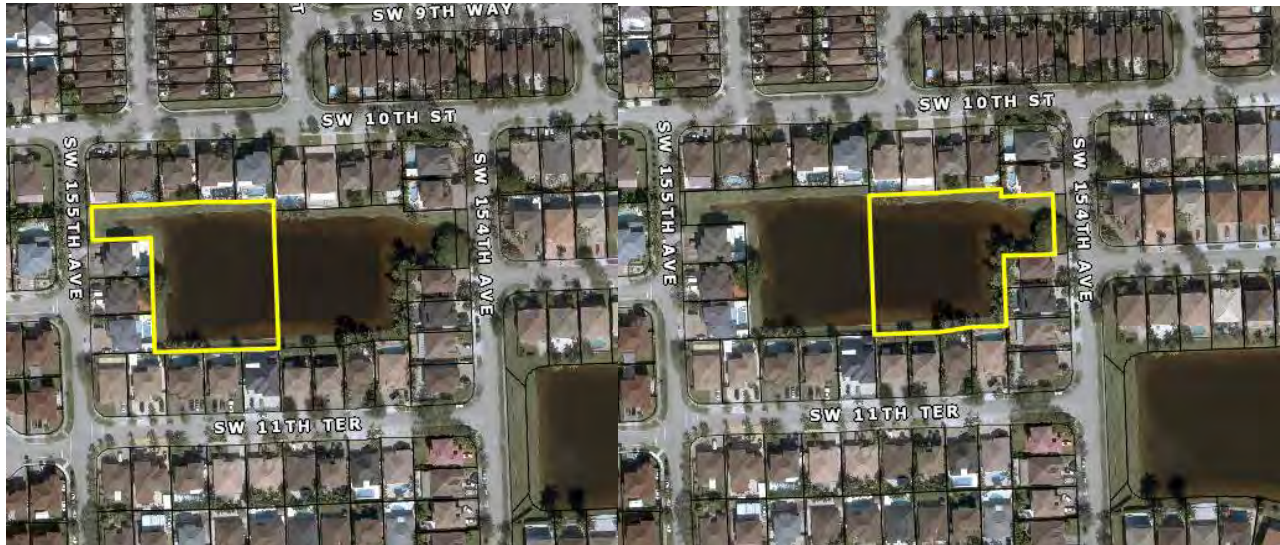


Figure 2: Lake 4 aerial from Miami-Dade County Property Appraiser Records

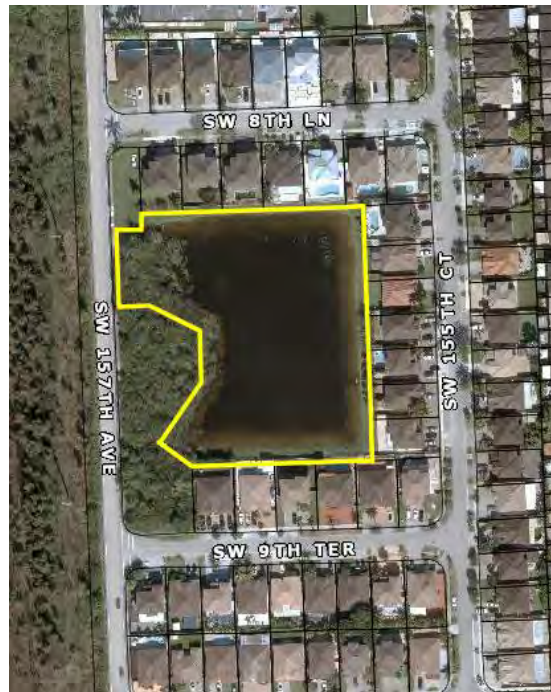


Figure 3: Lake 5 aerial from Miami-Dade County Property Appraiser Records



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Figure 4: Initial Site Conditions of Trails at Monterey, 1999 (google earth)



Figure 5: Current Site Conditions of Trails at Monterey, 2023 (google earth)



# *Landshore Enterprises, LLC*

*Streambank & Shoreline protection/stabilization/reclamation  
Environmental Engineering, Erosion Control, Construction Management  
d/b/a Erosion Restoration, LLC*

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## **Introduction – Landshore Enterprises, LLC:**

Landshore Enterprises, LLC (Landshore®), with offices in Fort Lauderdale, Florida and headquartered in Venice, Florida, is a turnkey national design-build environmental company specializing in shoreline erosion control, repair and restoration challenges. Landshore® uses non-structural, bioengineering and bio- technical methods to fulfill the demands of our clients.

Established over two decades ago, we have provided our services of excellence to golf courses, homeowner associations (managed properties), private residences, and governments in more than 10 states.

Landshore® is very conscientious about completing projects that reflect professionalism to the highest degree. We take a great deal of pride in each contracted service, no matter how large or small the project is. Our engineering expertise ensures that we will provide you with the best possible solution at the best possible price based on thorough research, investigation, and data interpretation from the job site.

Because of our engineering practices, our clients are assured that their shoreline erosion solution will endure for the longest amount of time possible. Additionally, the number of construction hours required for job completion are billed accurately and even the precise amount of quality materials for the best solution are deployed.

Our talented group of employees research and investigate public records on the subject site, conduct surveys, perform various tests such as measuring soil density and analyze results. From all the compiled information and subsequent analysis, we gain an understanding of the historical and current nature of the erosion changes concerning water levels, the amount of erosion loss over time, the slope of the eroded shoreline, and the stability of the surrounding soil.

We have the expertise, resources, technology, and collaborative insight to create designs and solutions that far exceed our client's expectations. Due to our extensive experience in resolving various erosion problems around the nation, Landshore® is proud to guarantee complete satisfaction on ALL projects.



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## **Objective:**

Our firm was contracted by the District to perform engineering services with the purpose of quantity take-off and preliminary construction cost estimate. Our main goal is to compile a report with soil erosion challenges identification, calculated stability, and recommended solutions, if any, to restore the lake shorelines into compliance, wherever economically feasible.

## **Existing Conditions:**

At the specific request of the District seeking possible solutions to address slope stability, public safety, and aesthetics issues of the shorelines, the subject site was assessed by our team of key professionals. It was found to exhibit signs of loss of valuable soil above the design water level, underwater shelf reposing itself where the shoreline has encroached closer to structures, change in embankment slopes, and unstable edge of embankment. Elements contributing to the embankment erosion are seepage, sheet flow, fluctuation of water levels, and wave action.

## General:

- The soil type is USDA Type 58-Cooper Town muck, according to the US Department of Agriculture. Refer to Exhibit 1: Soil Classification.
- To convert from National Geodetic Vertical Datum 1929 (NGVD29) to North American Vertical Datum 1988 (NAVD88), subtract 1.585 feet.
  - o Per originally permitted set of drawings, the top of the bank is shown at elevation 9.35' NGVD29, which is converted to 7.77' NAVD88, for purpose of this report.

## Lake 1:

- The shoreline length is approximately 1,560 linear feet.
- According to our survey, the top of the bank on the lot areas is approximately at elevation 7.32' NAVD88. According to our survey, the top of the bank on the common area is approximately at elevation 6.75' NAVD88. Per originally permitted set of drawings, the top of the bank should be at elevation 7.77' NAVD88.
- It is visible that there has been more than 2 feet of loss of land around the lake. This is due to the soil washing out over time and some factors contributing to the erosion, like water fluctuation, wave actions, sheetflow, and seepage soil erosion. To the naked eye, the soil reposing itself makes the embankment look aesthetically pleasing, however the soil continues to erode.



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## Lake 2:

- The shoreline length is approximately 1,971 linear feet.
- According to our survey, the top of the bank on the lot areas is at elevation 7.77' NAVD88, which complies with the originally permitted set of drawings.
- The common area has an approximate 7:1 degree slope.
- It is visible that there has been a loss of land around the lake. The south section of the shoreline is more severe, with approximately a loss of 4'. The rest of the shoreline has lost approximately 1' to 2' of land.
- As the soil is lost it tends to repose itself, thus creating steeper angles on the embankment.

## Lake 3:

- The shoreline length is approximately 801 linear feet, however it is recommended to repair only 742 linear feet, as 59 linear feet are considered wetlands.
- According to our survey, the top of the bank on the lot areas is at approximately elevation 6.77' NAVD88. Per originally permitted set of drawings, the top of the bank should be at elevation 7.77' NAVD88.
- The common area has an approximate 7:1-degree slope.
- This lake has a wetland that is in the Northwest corner of the lake and extends to the North along a residential lot. Landshore® had not proposed any restoration within this area or where the wetland intersects with the lake waterline and recommends that this area remains untouched.

## Lake 4:

- The shoreline length is approximately 1,360 linear feet.
- The Landshore's team found that the conditions surrounding lake 4 to the most severe of the 5 lakes within the community. The northern shoreline being the worst of the sections consisting of areas that have a 2:1 slope and appears to have lost 4 to 5 feet of shoreline due to erosion. Also, along the northern shoreline is a combination of soft edged and drop off measuring in at 1.5 to 2 feet. The soft edges can be described as thick fluffy grasses that could be misleading where people might think of the area as stable ground.
- The conditions along the West, East, and South shorelines are in better condition with loss of shoreline by about 1 to 2 feet width.
- Lake 4 has two common access areas:
  - The west access area could be described as a narrow canal leading towards the lake with no purpose other than providing additional stage storage for stormwater management. This narrow area is filled with soft muck, trash, and dead vegetation. This area is recommended to be cleaned.
  - The common access area to the East meets the 7:1 slope requirement but has lost the top berm elevation requirement of 7.77' NAVD88. Currently it is at elevation 7.18' NAVD88.
- Lake 4 also has a section along the south shoreline where a resident installed rock rip rap and a wood bulkhead. This does offer a means to protect against erosion but the other factors to consider, i.e., the



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top berm elevation and slope requirement are not being met. Thus, it is recommended that this rock rip rap wall will have to be removed when repairing the shoreline.

## Lake 5:

- The shoreline length is approximately 1,234 linear feet, however it is recommended to repair only 871 linear feet, as 363 linear feet are considered wetlands.
- According to our survey, the top of the bank on the lot areas is at approximately elevation 6.9' NAVD88. Per originally permitted set of drawings, the top of the bank should be at elevation 7.77' NAVD88.
- There are no common areas for lake 5.
- For the Northern section of the shoreline, we found that the top of the berm has several locations that have washed away material. These sections are found to be more prevalent in areas between the homes/buildings.
- The East and South shoreline are found to consist of uneven and potted terrain, possibly because of concrete stairs/steps that have been removed and other construction activities along the shoreline.
  - The soft muck found at the site is believed to be the cause of the shifting and settlement of material along the embankment.
- For the South shoreline, about 2 to 2.5 feet of shoreline land was lost with a drop of about 1.5 feet on average around the top of the berm.
- The West shoreline, consisting of a protected wetland, is Landshore's recommendation that no restoration be done for this area and any areas coming into proximity of the wetland be protected.

## All lakes:

The following is the scale used to identify the conditions of the lakes and our recommendations:

- 5 – Attention needed now
- 4 – Attention needed within a year (1 year)
- 3 – Attention needed within the next couple of years (1 to 2 years)
- 2 – Attention needed within the next few years (2 to 3 years)
- 1 – Attention needed within the next few years (3 to 5 years)

Recommended priority of shoreline restoration:

- Lake 4 - 5 rating
- Lake 2 - 4 rating
- Lake 1 - 3 rating
- Lake 5 - 2 rating
- Lake 3 - 1 rating



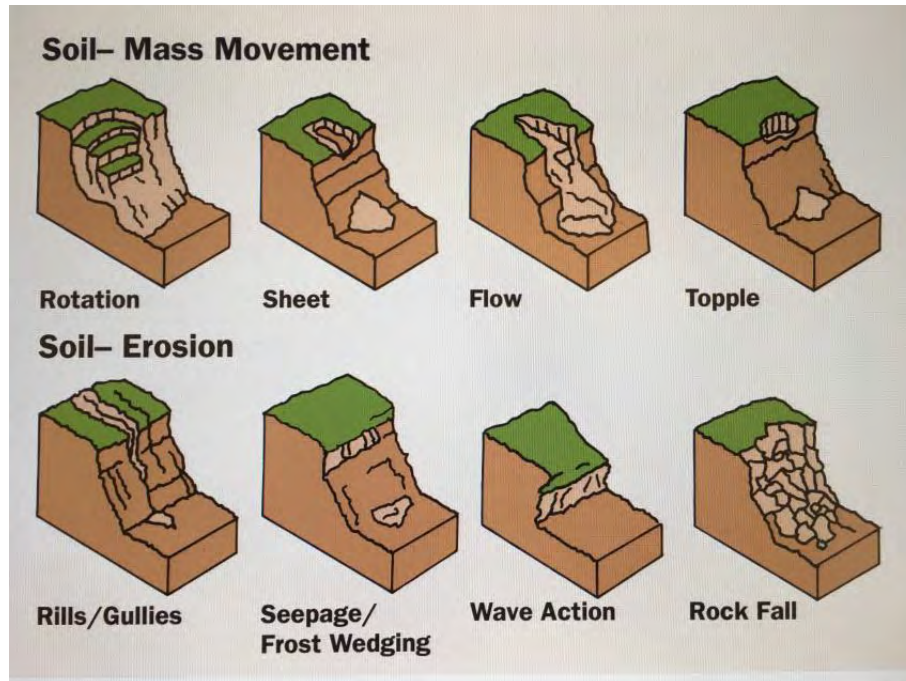


Figure 6: Types of soil erosion

Detachment and movement of soil or rock fragments by water, wind, ice, or gravity. The following terms are used to describe different types of soil erosion:

**Accelerated Erosion** – Erosion much more rapid than normal, or geologic erosion, primarily as a result of the influence of the activities of man, or in some cases, of other animals or natural catastrophes that expose base surfaces, for example, fires.

**Gully Erosion** – The erosion process whereby water accumulates in narrow channels and, over short periods, removes the soil from this narrow area to considerable depths, ranging from 1 to 2 feet to as much as 75 to 100 feet.

**Natural Erosion** – Wearing away of the earth's surface by water, ice, or other natural agents under natural environmental conditions of climate, vegetation, etc.; undisturbed by man.

**Normal Erosion** – The gradual erosion of land used by man which does not greatly exceed natural erosion.

**Rill Erosion** – An erosion process in which numerous small channels only several inches deep are formed; occurs mainly on recently disturbed and exposed soils.

**Sheet Erosion** – The removal of a fairly uniform layer of soil from the land surface by runoff water.

**Splash (Seepage) Erosion** – The spattering of small soil particles caused by the impact of rain drops on wet soils. The loosened and spattered particles may or may not be subsequently removed by surface runoff.



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## Lake 1 – Photos and cross section(s) of recommended solution(s)



Figure 7: Retaining wall failed, because of unsettled soils and saturated soils that increased the hydrostatic pressure.



Figure 8: Bank erosion, shown lost land and reposed embankment.



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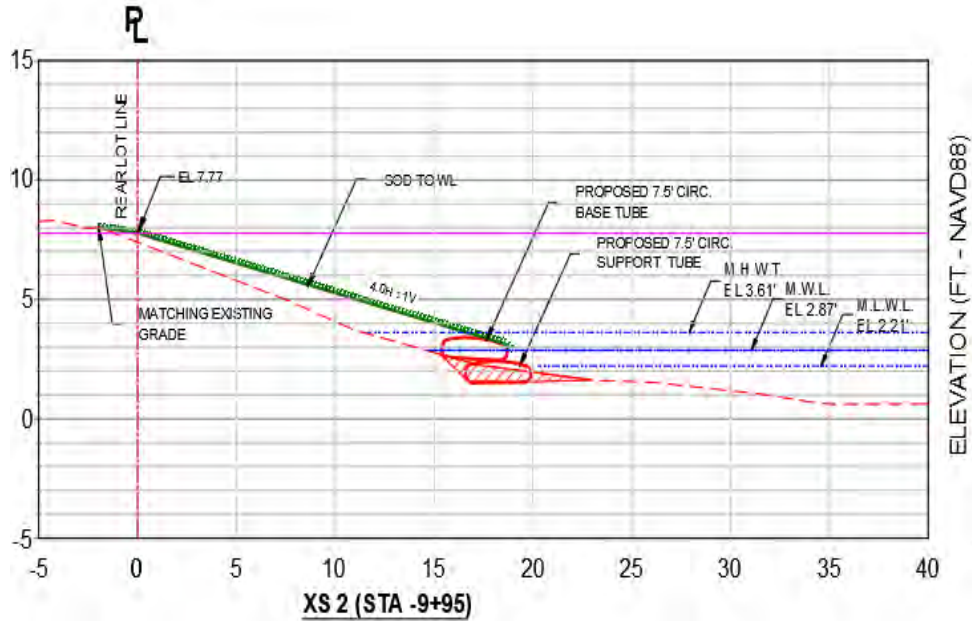


Figure 9: Cross Section 2 showing the recommended solution of installation of EFT® with two layers of permanent tubes  
Scale: Not to Scale

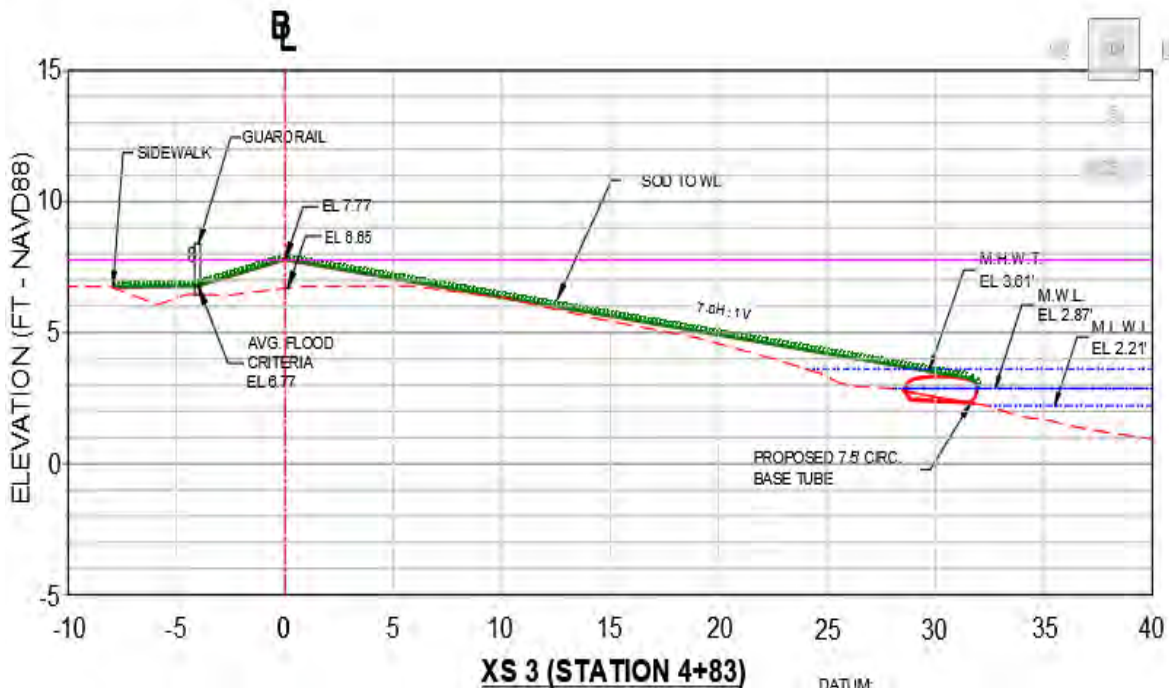


Figure 10: Cross Section 3 showing the recommended solution of installation of EFT® with one layer of permanent tubes  
Scale: Not to Scale



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Figure 11: Aerial of recommended erosion control elements



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## Lake 2 – Photos and cross section(s) of recommended solution(s)



Figure 12: Bank Erosion with steep drop and unstable embankment.



Figure 13: Bank Erosion shown lost soil over the years



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 d/b/a Erosion Restoration, LLC

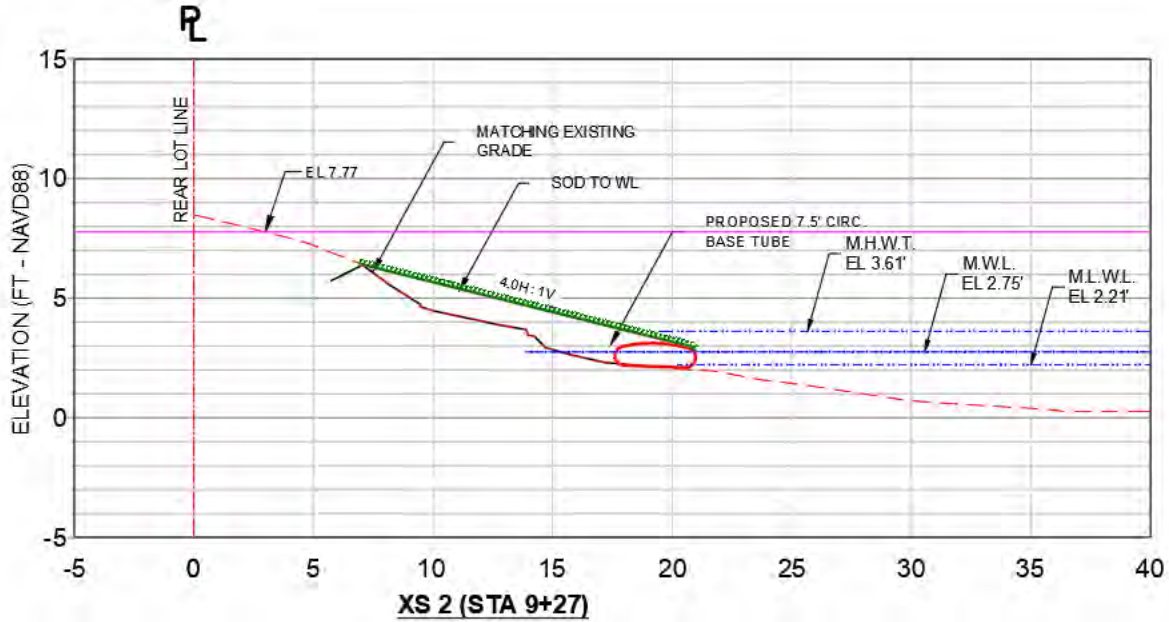


Figure 14: Cross Section 2 showing the recommended solution of installation of EFT® with one layer of permanent tubes  
 Scale: Not to Scale



Figure 15: Aerial of recommended erosion control elements



# Landshore Enterprises, LLC

Streambank & Shoreline protection/stabilization/reclamation  
Environmental Engineering, Erosion Control, Construction Management  
d/b/a Erosion Restoration, LLC

## Lake 3 – Photos and cross section(s) of recommended solution(s)



Figure 16: Bank Erosion with soil repose itself and at the same time slope become steeper



Figure 17: Bank Erosion with soil been lost and steep slope



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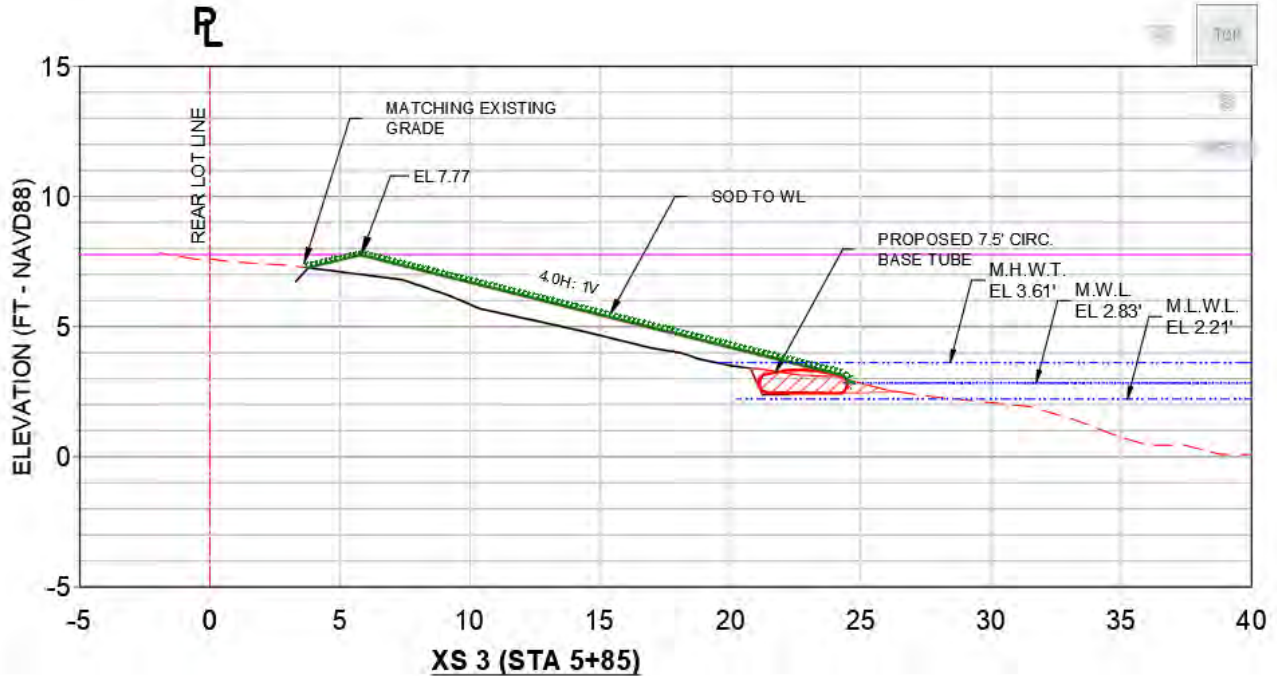


Figure 18: Cross section 3 showing the recommended solution of installation of EFT® with one layer of permanent tubes  
 Scale: Not to Scale



Figure 19: Aerial of recommended erosion control elements





# Landshore Enterprises, LLC

Streambank & Shoreline protection/stabilization/reclamation  
Environmental Engineering, Erosion Control, Construction Management  
d/b/a Erosion Restoration, LLC

## Lake 4 – Photos and cross section(s) of recommended solution(s)



Figure 20: Bank erosion with steep drop off at the embankment



Figure 21: Bank erosion with uneven shoreline at water's edge

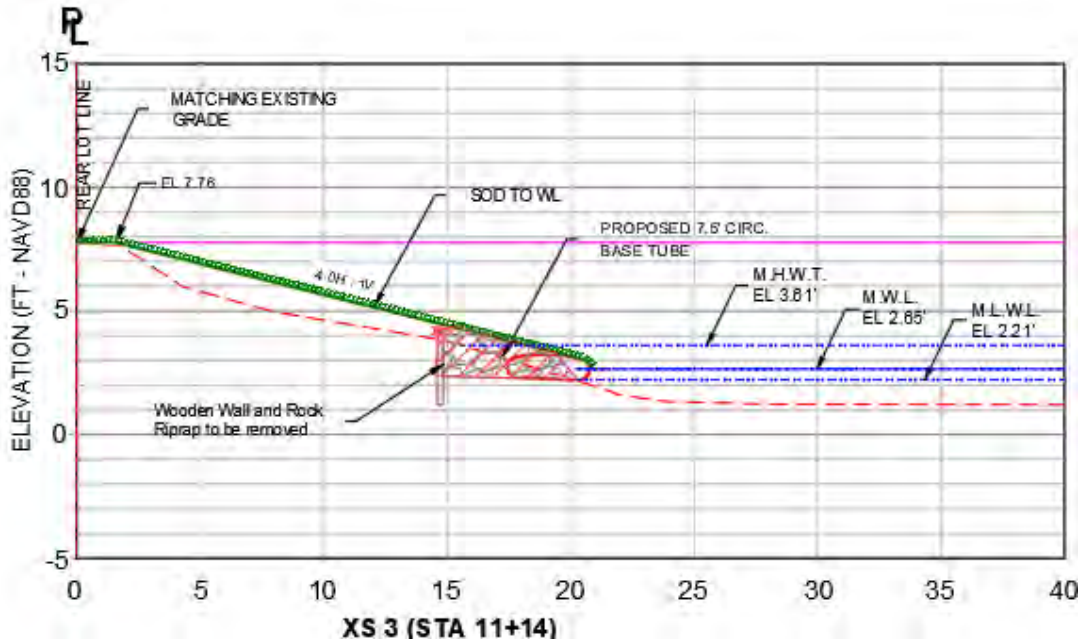


Figure 22: Cross Section 3 showing the recommended solution of installation of EFT® with one layer of permanent tubes  
 Scale: Not to Scale



Figure 23: Aerial of recommended erosion control elements



# Landshore Enterprises, LLC

Streambank & Shoreline protection/stabilization/reclamation  
Environmental Engineering, Erosion Control, Construction Management  
d/b/a Erosion Restoration, LLC

## Lake 5 – Photos and cross section(s) of recommended solution(s)



Figure 24: Bank Erosion getting closer to structures



Figure 25: Bank Erosion showing loss of material and headwall is a good indication of where the soil supposed to be at.



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 d/b/a Erosion Restoration, LLC

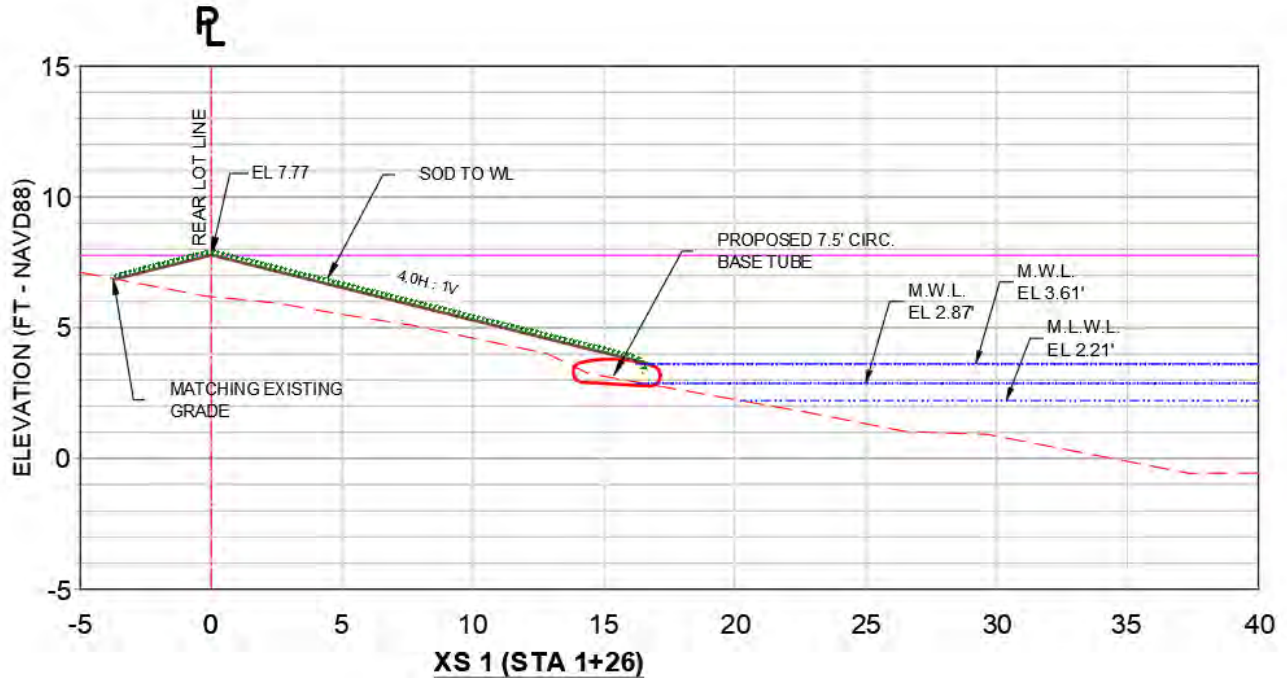


Figure 26: Cross Section 1 showing the recommended solution of installation of EFT® with one layer of permanent tubes  
 Scale: Not to Scale



Figure 27: Aerial of recommended erosion control elements



# Landshore Enterprises, LLC

*Streambank & Shoreline protection/stabilization/reclamation  
Environmental Engineering, Erosion Control, Construction Management  
d/b/a Erosion Restoration, LLC*

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## Recommended Erosion Control Element

Landshore® has expertise in design and installation of different remediation applications for slope stabilization and erosion control, including Articulating Concrete Block mat, bulkhead, Concrete Cloth™, Eco-Filter Tube®, Erosion Control Panel, Flexamat®, Flex MSE®, Geo Web®, gabions, Hydrotex™, reinforced concrete wall, rip-rap, sand cement wall, sheet piling, Turf Reinforcement Mat, littoral planting and others.

After performing a cursory review of several alternatives, it is our professional opinion, to the best of our knowledge and belief that present slope condition may be remedied by utilizing Eco-Filter Tube® and Concrete Block Mat (Flexamat® or ShoreFlex®), which installation is hereby recommended as most viable solutions and are described below.

### **Eco-Filter Tube (EFT®):**

EFT® or approved by Engineer equal product construction uses a woven or non-woven geotextile fabric that is formed into the shape of a tube. The tube container is filled with sand by direct coupling to a hydraulic dredge. The EFT® is designed to retain the granular fill portion of the dredge slurry, while appropriately sized openings in the material allow the excess water in the slurry to permeate through the tube walls. The procedure can be implemented in both dry and underwater conditions. The tubes can be fabricated in various circumferences, which, when inflated, will form a roughly elliptical shape. The EFT® system consists of a spun bound polyester filter fabric that is sewn together to form a tube which is placed along the water's edge and filled with sand to form an erosion barrier that after consolidation has the characteristics of a permeable, gravity type retaining wall.

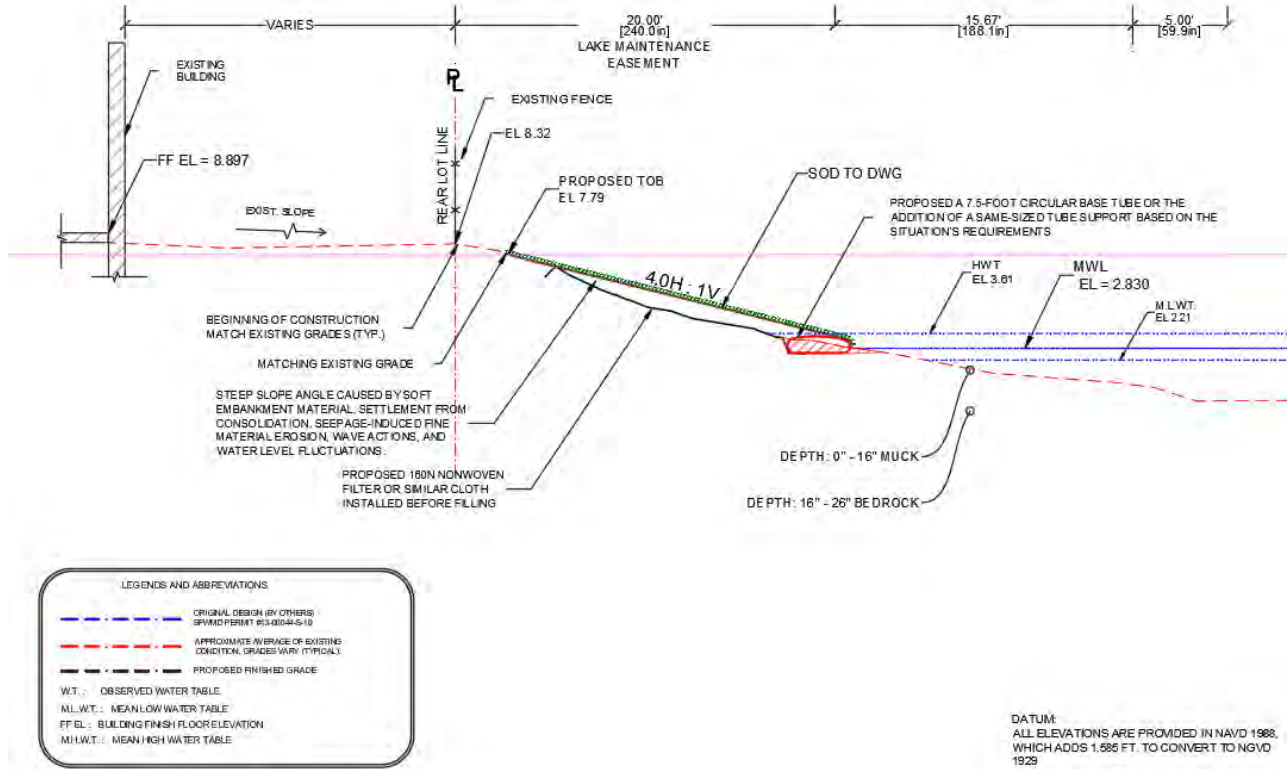
Some EFT® benefits include:

- ✓ Sand and geo-textile materials used in the tubes are essential to allow proper drainage and ensuring an environmentally friendly erosion control solution.
- ✓ The sand in the tubes functions as a filter for underwater seepage.
- ✓ The EFT® solution enhances the quality of the lake water as it keeps environmental threats from entering the body of water.
- ✓ EFT® installation bypasses the need to bring heavy equipment to the job site, preventing the possibility of damage from the large weight of the equipment.
- ✓ EFT® is one of the most economical embankment restoration solutions.



# Landshore Enterprises, LLC

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 d/b/a Erosion Restoration, LLC



Scale: Not to Scale

Figure 28: EFT® Typical Section



Figure 29: Example of EFT® Landshore's Installation



# Landshore Enterprises, LLC

Streambank & Shoreline protection/stabilization/reclamation  
Environmental Engineering, Erosion Control, Construction Management  
d/b/a Erosion Restoration, LLC

## Proper EFT® Design & Installation:

The main reasons for failure for geo-synthetic container application – are improper design or installation.

Landshore® developed software, patented technologies, trained professionals, laborers, and special survey crews who all work together as one team providing design, calculations, measurements, production and inspection to ensure stability and safety in compliance to local municipal codes, manufacturer's specifications and minimum engineering standards.

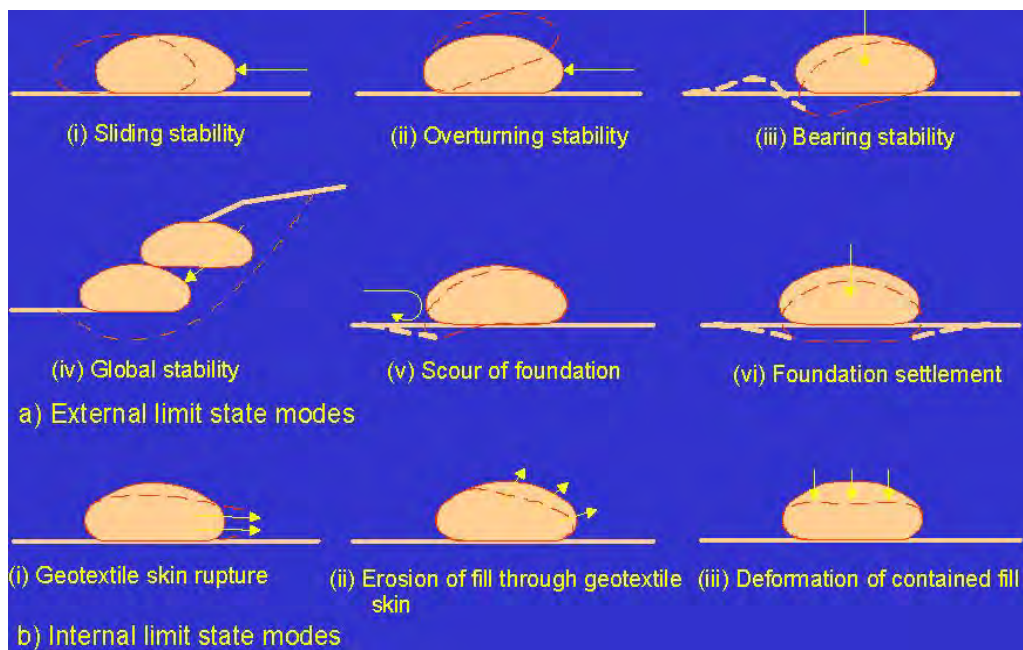


Figure 30: Geo-tube failure mechanisms



# Landshore Enterprises, LLC

Streambank & Shoreline protection/stabilization/reclamation  
 Environmental Engineering, Erosion Control, Construction Management  
 d/b/a Erosion Restoration, LLC

## Concrete Block Mat:

Concrete Block Mats are designed to prevent soil erosion and promote vegetation establishment in a wide variety of applications.

**Flexamat®:** Flexamat® is a vegetated concrete block mat utilized for stabilizing slopes, channels, low water crossings, inlet/outlet protection, and shorelines. It consists of concrete blocks (6.5" x 6.5" with a 2.25" profile) locked together and embedded into a high strength geogrid. There is 1.5" spacing between the blocks that gives the mat flexibility and allows for optional vegetation growth. The mat is packaged in rolls, making transporting and installing Flexamat® efficient. *Source: [www.flexamat.com](http://www.flexamat.com)*

**ShoreFlex®** is a permanent erosion prevention system that can be installed to shield channel side slopes and beds, pipe and culvert inlets/outlets, shoreline, and almost any place you may have hydraulic erosion protection needs. ShoreFlex® consists of a concrete block erosion control mat designed to be vegetated. ShoreFlex® comes in various customizable sizes and erosion control backing choices. Shoreflex® performs better than rock riprap and is easy to install and maintain. In addition, ShoreFlex® is environmentally friendly, grows green and can be mowed. *Source: [www.shoreflex.com](http://www.shoreflex.com)*

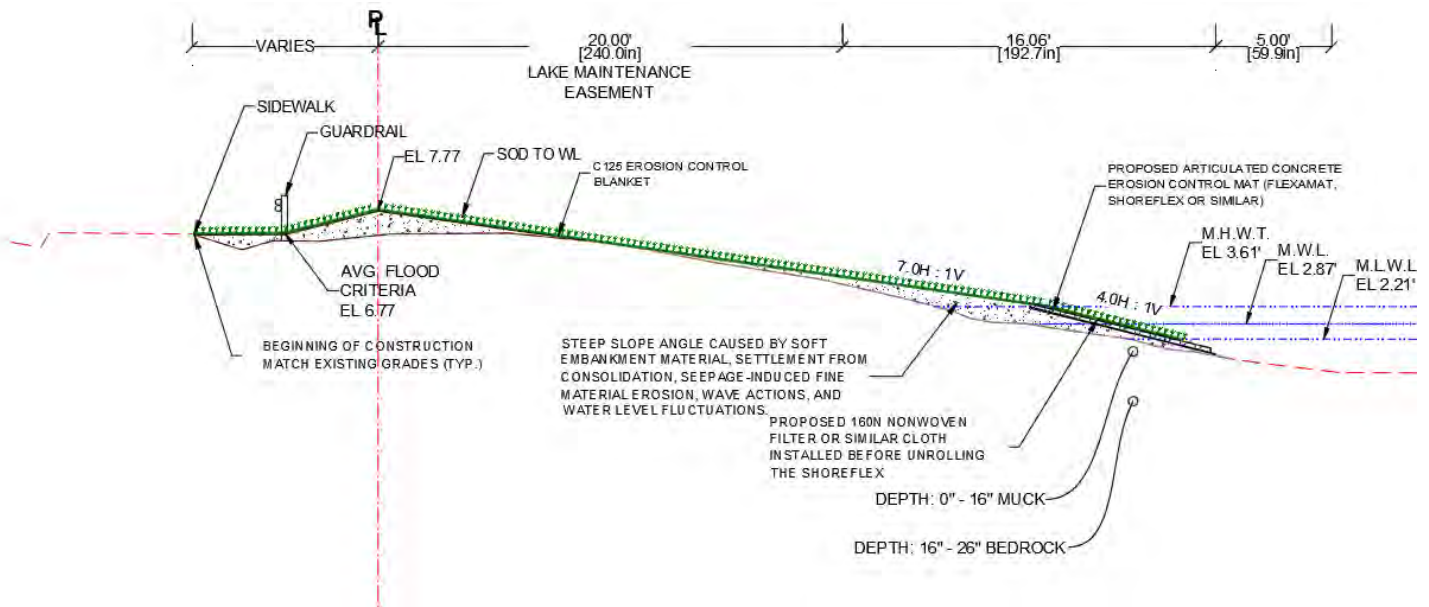


Figure 31: Concrete Block Mat Typical Section





# Landshore Enterprises, LLC

*Streambank & Shoreline protection/stabilization/reclamation  
Environmental Engineering, Erosion Control, Construction Management  
d/b/a Erosion Restoration, LLC*

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Figure 32: During Landshore's installation of Flexamat®



Figure 33: After Landshore's installation of Flexamat®



**Stability Analyses**

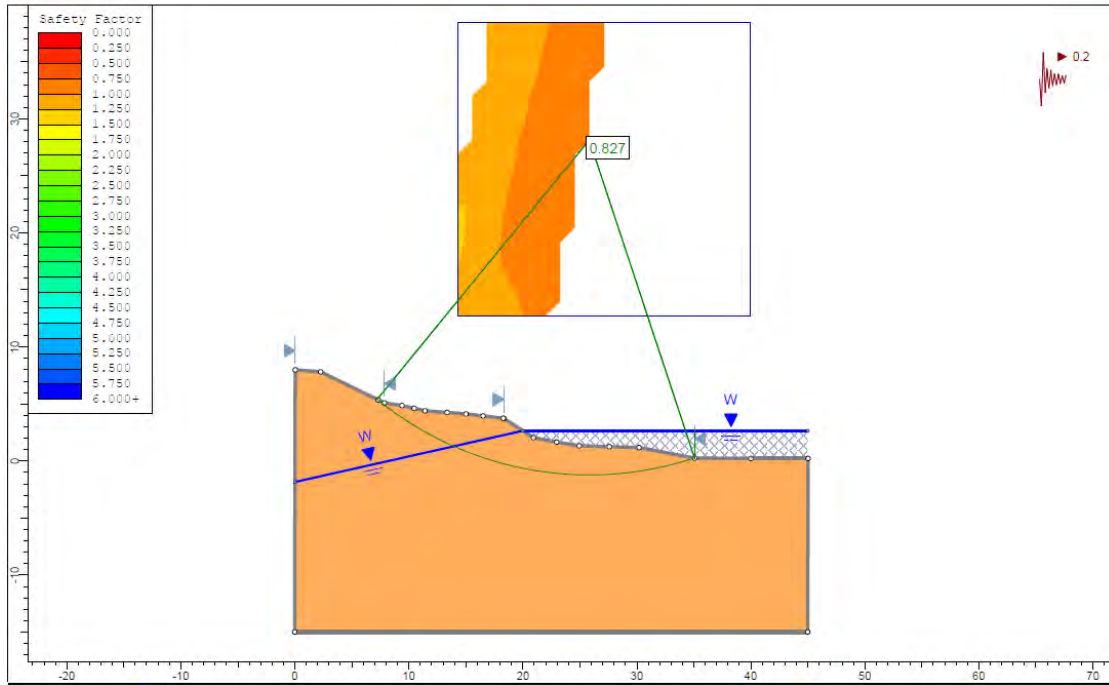


Figure 34: Stability Analysis before installation of eco-filter tubes

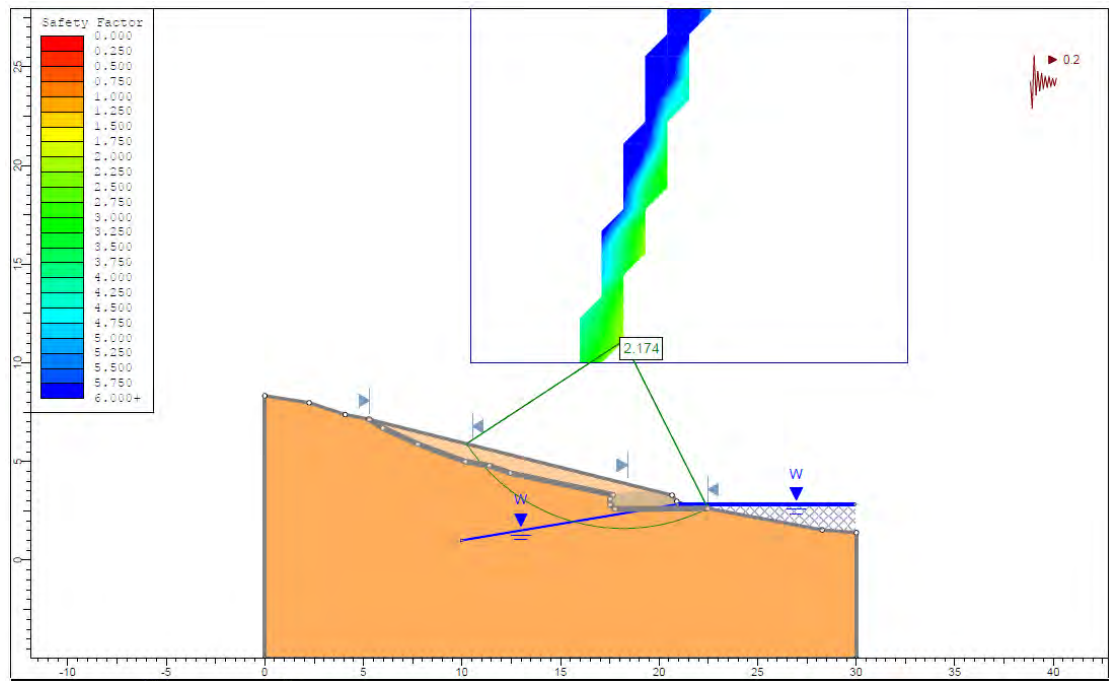


Figure 35: Stability Analysis after installation of eco-filter tubes



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 d/b/a Erosion Restoration, LLC

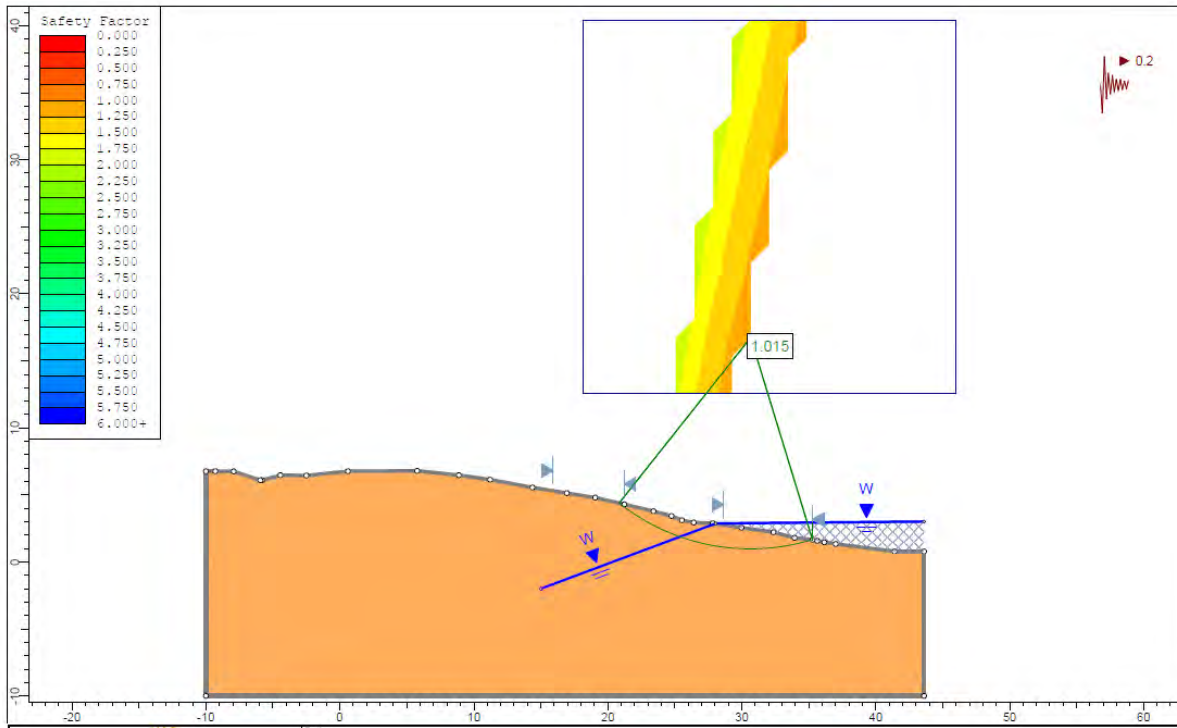


Figure 36: Stability Analysis before installation of concrete block mat

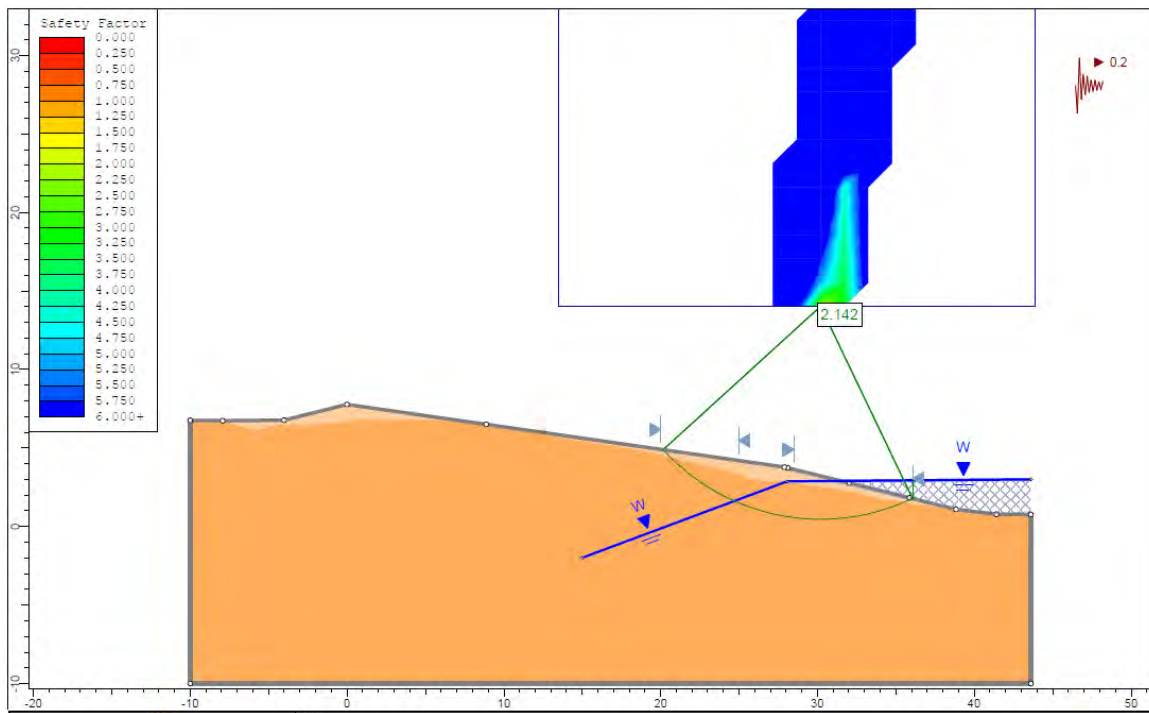


Figure 37: Stability Analysis after installation of concrete block mat



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## Estimated Volumes

Geo-synthetic container material, concrete block mat system, imported fill, site excavation and grading amounts were measured and calculated using Computer Aided Design software, based on average end area method using drawings, sections, details and manufacturer specifications as references.

### Lake 1:

1,560 linear feet of shoreline repair

1,010 sf of concrete block mat

1,478 lf of 7.5' circumference supporting eco-filter tube

1,435 lf of 7.5' circumference base eco-filter tube

800 cy of imported fill material to meet the berm requirement of 7.77' NAVD88

493 cy of imported fill material to fill in the eco-filter tubes

### LAKE 1 - Preliminary Opinion of Probable Costs: \$314,414

### Lake 2:

1,971 linear feet of shoreline repair

1,880 sf of concrete block mat

1,735 lf of 7.5' circumference base eco-filter tube

1,052 cy of imported fill material to meet the berm requirement of 7.77' NAVD88

294 cy of imported fill material to fill in the eco-filter tubes

### LAKE 2 - Preliminary Opinion of Probable Costs: \$348,120

### Lake 3:

742 linear feet of shoreline repair

680 sf of concrete block mat

662 lf of 7.5' circumference base eco-filter tube

398 cy of imported fill material to meet the berm requirement of 7.77' NAVD88

112 cy of imported fill material to fill in the eco-filter tubes

### LAKE 3 - Preliminary Opinion of Probable Costs: \$128,607



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## Lake 4:

1,360 linear feet of shoreline repair

392 sf of concrete block mat

1,309 lf of 7.5' circumference base eco-filter tube

671 cy of imported fill material to meet the berm requirement of 7.77' NAVD88

222 cy of imported fill material to fill in the eco-filter tubes

## **LAKE 4 - Preliminary Opinion of Probable Costs: \$214,172**

## Lake 5:

871 linear feet of shoreline repair

871 lf of 7.5' circumference base eco-filter tube

415 cy of imported fill material to meet the berm requirement of 7.77' NAVD88

148 cy of imported fill material to fill in the eco-filter tubes

## **LAKE 5 - Preliminary Opinion of Probable Costs: \$131,521**

## **FIVE LAKES - Preliminary Opinion of Probable Costs: \$1,136,834**

NOTE: Please note that these estimates are based on current prices and inflation should be considered for budgetary purposes, if the community would like to repair their shorelines over an extended period of time.



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## **Conclusion**

Landshore® is devoted to thoroughly study each individual project from every perspective and strive to perform the best possible design that solves the erosion problem.

We suggest that the District consult with our Company for all future development and shoreline repair projects, in order to avoid predictable dangerous conditions and save money via preventative actions.

Landshore is a turn-key multi-discipline design-build environmental company which focuses on erosion issues using non-structural, bioengineering and bio-technical methods for shoreline restoration, erosion control and coast protection.

Established more than two decades ago we employ civil, structural, geo-technical, surveying, environmental and other professionals, providing viable customized solutions and highest level of service through innovation in engineering design, advancement and patenting of materials, scientific research and development of new construction technologies.

If you have any additional questions, or require further information, do not hesitate to contact us at (954) 327-3300 or via email at [info@landshore.com](mailto:info@landshore.com).

We look forward to having the pleasure of continuing doing business with you.

Sincerely,  
Nicolas Valles-Negrette  
Senior Engineer  
Qualified Stormwater Management Inspector Number 41451

André van den Berg  
President  
Qualified Stormwater Management Inspector Number 37843

Landshore Enterprises, LLC



# Landshore Enterprises, LLC

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Environmental Engineering, Erosion Control, Construction Management  
d/b/a Erosion Restoration, LLC*

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## Exhibit 1: Soil Classification

The soil classification system that we used was the US Department of Agriculture classification based on soil textures, which defines twelve major soil texture classifications (sand, loamy sand, sandy loam, loam, silt loam, silt, sandy clay loam, clay loam, silty clay loam, sandy clay, silty clay, and clay). Soil textures are classified by the fractions of sand, silt, and clay in a soil. Classifications are typically named for the primary constituent particle size or a combination of the most abundant particles sizes (e.g., sandy clay, silty clay). Loams are soils having roughly equal proportions of sand, silt, and/or clay in a soil sample.

According to the U.S. Department of Agriculture, the soil is type Cooper Town muck, which consists of very deep, poorly drained, slowly permeable soils on broad and low flats. Slopes range from 0 to 1 percent.

Understanding the context of shoreline stabilization for five lakes, the presence of USDA Type 58-Cooper Town muck, pounded-urban complex, 0 and 1 percent slopes with a typical profile of 0 – 16 inches: muck and 16 to 26 inches: bedrock, and the soil around the shoreline classified as silty sand with gravel, presents a unique set of challenges.

The first concern is the muck layer, which is soft and compressible due to its high organic content. This layer, combined with a factor of safety of less than 1, indicates that the current soil conditions are not stable enough to resist the forces exerted by the lake water, particularly during periods of high-water levels or storm events. The presence of silty sand with gravel around the shoreline also suggests a high potential for erosion, which could further destabilize the shoreline and lead to loss of land.

To mitigate these issues, we could contemplate a variety of shoreline stabilization strategies. These might encompass the deployment of robust structures like seawalls, articulating concrete blocks, rock riprap, among others, which serve as tangible blockades against wave action and erosion. Nonetheless, these approaches can incur substantial costs and potentially inflict adverse effects on the natural environment, compromising the aesthetic appeal of the lakeshore. As a solution, the use of Eco-filter tubes could be considered. These tubes not only serve the purpose of shoreline protection but are also environmentally friendly, cost-effective, and maintain the natural beauty of the lakeshore, thus offering a sustainable alternative to traditional methods.

Soft stabilization techniques, such as beach nourishment, vegetation planting, or the creation of living shorelines, could also be considered. These methods work with natural processes to enhance shoreline stability and can provide additional benefits such as habitat creation and improved water quality. However, they may require ongoing maintenance and may not be suitable for all sites or conditions.

Given the presence of muck and the shallow bedrock, it may also be necessary to consider ground improvement techniques to increase the soil's strength and stability. This could involve the removal and replacement of the muck layer, soil compaction, or the use of geosynthetic materials to reinforce the soil. The use of geosynthetic materials like geotextiles is particularly recommended due to their ability to provide immediate stabilization of the soil. Geotextiles are permeable fabrics that, when used in association with soil, have the ability to separate, filter,



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reinforce, protect, or drain. They help in preventing soil erosion and in maintaining the structural integrity of the soil, especially in areas with muck and shallow bedrock. Their use can significantly improve the soil's strength and stability, making it more suitable for construction or other uses.

In all cases, a thorough geotechnical investigation will be necessary to understand the soil properties and determine the most appropriate stabilization techniques. The factor of safety will need to be recalculated after implementing any stabilization measures to ensure it is above 1.3 indicating a stable and safe shoreline.

In conclusion, while the current soil conditions present significant challenges for shoreline stabilization, with careful planning, investigation, and the implementation of appropriate engineering solutions, it is possible to stabilize the shoreline of these five lakes. The chosen solution should balance the need for stability and safety with the desire to preserve the natural environment and beauty of the lakeshore.



TRAILS AT MONTEREY CDD

SHORELINE MITIGATION - LAKE 1	COSTS
SHORELINE REPAIR (LANDSHORE ESTIMATE)	\$ 314,414.00
ENGINEERING PLANS	\$ 7,340.00
PERMITTING	\$ 3,670.00
ENGINEERING PROJECT MANAGEMENT	\$ 6,000.00
PAYMENT & PERFORMANCE BONDS	\$ 8,808.00
INFLATION 3% (CONSTRUCTION & MATERIALS)	\$ 9,432.42
CONTINGENCY 10%	\$ 34,966.44
<b>ESTIMATED LAKE 1 COSTS</b>	<b>\$ 384,630.86</b>

SHORELINE MITIGATION - LAKE 2	COSTS
SHORELINE REPAIR (LANDSHORE ESTIMATE)	\$ 348,120.00
ENGINEERING PLANS	\$ 8,125.00
PERMITTING	\$ 4,062.50
ENGINEERING PROJECT MANAGEMENT	\$ 6,000.00
PAYMENT & PERFORMANCE BONDS	\$ 9,750.00
INFLATION 3% (CONSTRUCTION & MATERIALS)	\$ 10,443.60
CONTINGENCY 10%	\$ 38,650.11
<b>ESTIMATED LAKE 2 COSTS</b>	<b>\$ 425,151.21</b>

SHORELINE MITIGATION - LAKE 3	COSTS
SHORELINE REPAIR (LANDSHORE ESTIMATE)	\$ 128,607.00
ENGINEERING PLANS	\$ 3,000.00
PERMITTING	\$ 1,500.00
ENGINEERING PROJECT MANAGEMENT	\$ 6,000.00
PAYMENT & PERFORMANCE BONDS	\$ 3,600.00
INFLATION 3% (CONSTRUCTION & MATERIALS)	\$ 3,858.21
CONTINGENCY 10%	\$ 14,656.52
<b>ESTIMATED LAKE 3 COSTS</b>	<b>\$ 161,221.73</b>

SHORELINE MITIGATION - LAKE 4	COSTS
SHORELINE REPAIR (LANDSHORE ESTIMATE)	\$ 214,172.00
ENGINEERING PLANS	\$ 5,000.00
PERMITTING	\$ 2,500.00
ENGINEERING PROJECT MANAGEMENT	\$ 6,000.00
PAYMENT & PERFORMANCE BONDS	\$ 6,000.00
INFLATION 5% (CONSTRUCTION & MATERIALS)	\$ 6,425.16
CONTINGENCY 10%	\$ 24,009.72
<b>ESTIMATED LAKE 4 COSTS</b>	<b>\$ 264,106.88</b>

SHORELINE MITIGATION - LAKE 5	COSTS
SHORELINE REPAIR (LANDSHORE ESTIMATE)	\$ 131,521.00
ENGINEERING PLANS	\$ 3,070.00
PERMITTING	\$ 1,535.00
ENGINEERING PROJECT MANAGEMENT	\$ 6,000.00
PAYMENT & PERFORMANCE BONDS	\$ 3,684.00
INFLATION 3% (CONSTRUCTION & MATERIALS)	\$ 3,945.63
CONTINGENCY 10%	\$ 14,975.56
<b>ESTIMATED LAKE 5 COSTS</b>	<b>\$ 164,731.19</b>
<b>ESTIMATED TOTAL COSTS</b>	<b>\$ 1,399,841.87</b>

8/2/2023

**NOTICE OF PUBLIC HEARING AND REGULAR BOARD MEETING OF  
THE TRAILS AT MONTEREY COMMUNITY DEVELOPMENT DISTRICT**

CATEGORYHearings FL

AD NUMBER0000676200-01

The Board of Supervisors (the "Board") of the Trails at Monterey Community Development District (the "District") will hold a Public Hearing and Regular Board Meeting on August 22, 2023, at 6:30 p.m., or as soon thereafter as the meeting can be heard, in the Conference Room at the Kendall Executive Center located at 8785 SW 165th Avenue, Suite 200, Miami, Florida 33193. The purpose of the Public Hearing is to receive public comment on the Fiscal Year 2023/2024 Proposed Final Budget of the District. A copy of the Budget and/or the Agenda may be obtained from the District's website ([www.trailsatmontereycdd.org](http://www.trailsatmontereycdd.org)) or at the offices of the District Manager, 2501A Burns Road, Palm Beach Gardens, Florida 33410, during normal business hours. The purpose of the Regular Board Meeting is for the Board to consider any/all business which may properly come before it. The meetings are open to the public and will be conducted in accordance with the provisions of Florida law for community development districts. Meetings may be continued as found necessary to a time and place specified on the record. There may be occasions when one or two Supervisors will participate by telephone; therefore, a speaker telephone will be present at the meeting location so that Supervisors may be fully informed of the discussions taking place. In accordance with the provisions of the Americans with Disabilities Act, any person requiring special accommodations or an interpreter to participate at these meetings should contact the District Manager at (561) 630-4922 and/or toll-free at 1-877-737-4922, at least seven (7) days prior to the date of the meetings. If any person decides to appeal any decision made with respect to any matter considered at this Public Hearing and Regular Board Meeting, such person will need a record of the proceedings and such person may need to ensure that a verbatim record of the proceedings is made at their own expense and which record includes the testimony and evidence on which the appeal is based. Meetings may be cancelled from time to time without advertised notice.

**Trails at Monterey Community Development District**

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

8/2-9 23-14/0000676200M

**From:** [Albert Maillo](#)  
**To:** [Nancy Nguyen](#)  
**Cc:** [blackwaterplumb@gmail.com](mailto:blackwaterplumb@gmail.com)  
**Subject:** Objection to Proposed 2023-2024 Non-Ad Valorem Assessment Increase  
**Date:** Friday, July 28, 2023 3:32:25 PM

---

To the Board of Supervisors of the District,

The residents/property owners of 15437 SW 18 ST hereby **object** to the proposed 2023-2024 Non-Ad Valorem assessment increase.

Thank you.

**From:** [Suarez-Hale, Ileana](#)  
**To:** [Nancy Nguyen](#)  
**Subject:** Trails of Monterey proposed assessment  
**Date:** Monday, July 31, 2023 8:10:42 AM

---

Good morning,

This is in reference to the letter received on the proposed assessment per unit for Trails at Monterey. **Accept this email as an objection to proposed assessment.**

Also, I would like to obtain a copy of the budget for fiscal year 2024 and the current budget expenses for fiscal year 2023. If someone can please let me know how to obtain those.

Thank you,

Ileana Suarez Folio#30-4904-003-0800

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Under Florida law, most e-mail messages to or from Broward County employees or officials are public records, available to any person upon request, absent an exemption. Therefore, any e-mail message to or from the County, inclusive of e-mail addresses contained therein, may be subject to public disclosure.

**From:** [Ivonne Jimenez](#)  
**To:** [Nancy Nguyen](#)  
**Subject:** Trails of Monterey CDD  
**Date:** Tuesday, August 1, 2023 2:13:29 PM

---

To whom it may concern:

Re: Folio #30-4909-004-1490

We are in receipt of your letter dated July 21, 2023 regarding the proposed Non-Ad Valorem Assessment increase. This email is to make it known our complete objection to this increase.

Our home was purchased pre-construction and as the original property owners we have seen the CDD increase slightly every year for the past 19 years we've lived here. This year however, the increase is exorbitant. After speaking with multiple neighbors I know we are not alone in this sentiment. Driving around our community the price increase you are proposing does not justify its value. Multiple main roads are in much need of repair/paving. Case and point SW 157 Ave., heading south from SW 8 Street. Multiple sidewalks are also in need of attention. Overgrown trees that were planted by the sellers blocking street lights. As for the Erosion Control Project, the only maintenance for our community man-made lakes is lawn maintenance. Again, price value is not justified.

In summary, in the 19 years we have resided in this community, none of the roadways or sidewalks, have been improved upon. The improvements are those personally made by property owners to their property. The exorbitant price increase you are proposing is not justified.

Respectfully,

Ivonne and Amado Jiménez

Date: August 1, 2023

From: Luis Sanchez

To: Trails at Monterey Community District Manager, Board of Supervisors of the District, or to whom it may concern:

I'm the owner of the property located at 15477 SW 115<sup>th</sup> Ln Miami, Florida 33186. Last week, I received a letter from you concerning a proposed Non-Ad Valorem assessment. According to the letter, it is an assessment increase for the Fiscal Year 2023/2024. The total proposed amount is \$1,958.43, which is practically the double of the amount I've been paying you during the last 20 years.

This is an insult to all homeowners living in that area where you have done absolutely nothing. No roadways, stormwater management system or "other related improvements benefiting properties within the District" is been done for 20 years. We pay the Miami -Dade County taxes year after year to repair roadways, sewer, trees, etc. We actually don't need anything from you. It looks to me that you are nothing but a bunch of delinquents trying to steal more money from us. Local, State or Federal authorities may need to look into this seriously.

Property owner

**From:** [Alice Galan](#)  
**To:** [Nancy Nguyen](#)  
**Cc:** [Rigoberto Galan](#)  
**Subject:** Trails at Monterey  
**Date:** Thursday, August 3, 2023 1:32:40 PM

---

To Whom it May Concern:

The purpose of my email is because I am in receipt of your letter informing that there will be an increase to the annual assessment to Trails of Monterey. My property is located at  
15466 SW 13 Ter.

I am in complete disagreement to this proposed increase. If the bulk of the increase is related to the lakes in the area, I do not have access to these lakes. Access (shoreline) to these lakes are on private property so why should I have to pay, if anything these houses on the lakes should have to pay. Over the past 20 years the district has collected about \$800 per house. We are talking over \$6.5 million dollars. What was this money used for?

I request to see how the funds have been used over the past 20 years. I have lived in the area for all of the 20 years and only once I remember seeing fumigation, other than that nothing.

How will \$800,000 annually be used in the future and for how many years?

In my opinion Caribe only created Trails at Monterey as a form to collect money from residents without accountability.

Up until this letter, I didn't even know where your offices were located and Miami Dade County said they have nothing to do with Trails at Monterey so they are no help.

I intend to talk to as many neighbors as possible so that we can all get answers about the funds paid to Trails at Monterey.

How can you in right conscience ask the residents to allow a more than 150% increase in assessments. Increases of this nature are more than extraordinary and warrants even lawyers/authorities/ or Miami Dade County to look into.

Rigoberto and Alice Galan

August 05, 2023

Nancy Nguyen  
District Manager  
Special District Services, Inc.  
Trails at Monterey Community Development District  
2501A Burns Road  
Palm Beach Gardens, FL 33410

Subject: Objection to Proposed Assessment Increase for the Fiscal Year 2023/2024 and Request for Detailed Information

Dear Ms. Nguyen,

I hope this letter finds you well. My name is Jorge Garcia Hernandez, and I am a resident and property owner within the Trails at Monterey Community Development District. I am writing to express my objection to the proposed assessment increase for the fiscal year 2023/2024 and to request additional detailed information justifying the reasons for this increase.

I understand that the District Board of Supervisors is proposing to raise the operation and maintenance (O&M) portion of the assessments by approximately \$1,205 per unit to provide the necessary services to the District including, but not limited to (1) the Erosion Control Shoreline Restoration and (2) Repairs and Maintenance for district-owned infrastructure. While I acknowledge the importance of maintaining and enhancing our community, I am concerned about the financial burden this increase may impose on property owners like myself.

To better understand the basis for this proposed assessment increase, I kindly request detailed information regarding the following:

- A comprehensive breakdown of the costs associated with the Erosion Control Shoreline Restoration project. Specifically, I would like to know the estimated costs of the project, the scope of work involved, who is performing the work, and the expected duration for completion.
- A separate breakdown of the projected costs associated with operations, repairs, and maintenance projects (excluding the Erosion Control Shoreline Restoration project) for the fiscal year 2023/2024. I would like to know the estimated costs



for repairing our roads, lighting infrastructure, and other maintenance activities. Separating these costs from the more specific Erosion Control Shoreline Restoration project will provide clarity on the budget allocation for each project/activity.

- An explanation of how these projects will directly benefit the community and each resident like myself. Understanding the specific impacts and advantages of the Erosion Control Shoreline Restoration project and any other specific repair and maintenance projects is essential for property owners to make informed decisions.
- A comparison of the current level of operations and maintenance (O&M) costs with the proposed increase. I would like to better understand the reasons behind the significant increase of approximately \$1,205 per unit. If you can provide a side-by-side breakdown of the current O&M costs (as they are currently being funded) and the projected O&M costs with the proposed increase, would help me understand the increase.
- Lastly, I would like to know if the District has considered and sought alternative funding sources or grants to alleviate the need for such a substantial assessment increase. Exploring other financial options may help reduce the burden on property owners while maintaining the necessary level of maintenance.

Thank you for considering this objection and my request for additional information. As a stakeholder in this community, open communication and collaboration are essential for making informed decisions that benefit all residents.

Please feel free to contact me at [jorgegarcia.info@gmail.com](mailto:jorgegarcia.info@gmail.com) if you require any further information or have any updates to share.

Sincerely,

Jorge Garcia Hernandez  
15465 SW 13TH TER  
Miami, FL 33194  
[jorgegarcia.info@gmail.com](mailto:jorgegarcia.info@gmail.com)  
786-709-9960

August 7, 2023

Trails at Monterrey Community Development District

c/o Special District Services, INC.

2501 Burns Road

Palm Beach Gardens, Fl, 33410

From: Daniel and Maria E. Sosa

854 SW 155<sup>th</sup> CT

Miami, Fl, 33194

FOLIO # 30-4904-003-0100

In reference to: Proposed increase of NON-AD-VALOREM assessment.

To Whom it may concern:

We are in receipt of a letter dated July 21, 2023, from Trails at Monterrey, where we are notified of a proposed Non-Ad Valorem assessment increase commencing in the fiscal year 2023/2024 to be levied against benefitted properties within the Trails at Monterrey CDD.

This letter is in response to and in protest to the proposed increase, which is an unsurmountable amount of money to be imposed on the residents of this community district and be added to the already extremely high taxed properties.

I am asking for a re-consideration of this assessment, since many people, including our household members, do not have the necessary resources for such assessment, and I am sure that many will protest at the meeting, and many will consider abandoning this community where it is becoming impossible to live.

First, we do not live on property adjacent to the lakes, and do not see any benefit for us with this assessment.

Second, we have conducted some research regarding the duties of the Community Development District, and some of the duties are not followed during the almost 20 years we have lived here.

See list of tasks as follows:

#### WHAT IS INCLUDED IN A CDD FEE?

- Water management and control.
- Water supply (The water comes from Miami-Dade County Water department, not from the CDD)
- Sewer (We pay a high bill to Miami-Dade County for a sewer we don't even have)
- Wastewater management (Miami-Dade County)
- Bridges and culverts (Miami-Dade County and the State of Florida)
- District roads and streetlights (Miami-Dade County, and another CDD that we have to pay for lighting, which most of the time there are no lights or poor lighting in my area)
- Public transportation and parking (SINCE WHEN? That is Miami- Dade County Transit)
- Investigation and remediation of environmental contamination (Perhaps, but Miami-Dade County has a department for that)
- Conservation areas.
- Park and recreation facilities (Miami-Dade County has a Park and Recreation Department and we pay taxes for the parks and schools)
- Fire prevention and control (Do you have your own fire-fighters? That is also Miami Dade county and we pay for that in our taxes)
- School buildings and related structures (We pay for a very high price for schools with our taxes)
- Security ( We have not seen a single security guard in our area in our almost 20 years of residency)

Also, where are the approximately \$10,500,000.00 that the CDD has collected in approximately 20 years from the community members? Where did that money go? Is it possible that some of that money could be used to work in fixing the lakes?

There are many unanswered questions, and research to be made into these charges from the residents of this community that cannot deal with the expenses of the present inflation, high gasoline prices, high insurance prices, high food prices, and extremely high taxes.

This letter should serve as our representation at the board meeting scheduled for August 22, 2023. Let us know if any additional documentation is needed.

With our regards,

  
Daniel Sosa and Maria E. Sosa

854 SW 155<sup>th</sup> CT

Miami, Florida, 33194

[Guajira1959@bellsouth.net](mailto:Guajira1959@bellsouth.net)

[Dansosa1959@gmail.com](mailto:Dansosa1959@gmail.com)

**From:** [Paul Hamilton](#)  
**To:** [Nancy Nguyen](#); [Martha Moncada](#)  
**Subject:** Folio # 30-4909-004-0860  
**Date:** Tuesday, August 8, 2023 12:49:37 PM  
**Attachments:** [Scan 6.pdf](#)

---

August 8, 2023

Good afternoon,

I am Paul Hamilton

Folio# 30-4909-004-0860

I am against the proposed assessment increase as it is double the amount we currently pay.

This will be a significant hardship to keep my home and support my family.

Thank you for your time,

*Paul Hamilton*

**From:** [lmcbabyprizes@aol.com](mailto:lmcbabyprizes@aol.com)  
**To:** [Nancy Nguyen](#)  
**Subject:** special purpose  
**Date:** Tuesday, August 8, 2023 10:01:44 PM

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I, Azalea Moran, hereby state that I am withdrawing my previous certified letter requesting the installation of a water fountain in the lake in the rear of my home located at 1680 SW 154 Path Miami, Florida 33185 that you own.

This is in fact of your letter Trails At Monterey Community Development District c/o Special District Services, Inc. dated July 21, 2023.

It's my understanding you are requesting a tax increase on my property of \$1958.43 yearly to bare your responsibility?

It is appalling that you are requesting that we the homeowners bare your responsibility!

I REFUSE YOUR REQUEST TO INCREASE MY TAXES WHICH ARE ALREADY SUPER HIGH ALREADY TO BARE YOUR RESPONSIBILITY!!!!!!

You must be crazy.

Excuse me.

Sincerely

Azalea Moran

August 15, 2023

Dear Board Supervisors,

Although I have spoken with three of you already, I am writing to formally address my discontent with the recent proposal for the reconstruction of the 5 lakes within our community. During our conversations, I communicated my commitment to my family and members of the community.

I want to assure you that I have taken it upon myself to voice my discontent and commitment to my family and fellow community members against any actions that may seem to compromise the transparency and integrity of our community's financial matters. Through this letter, I would like to also acknowledge the shared sentiment of surprise that this increase in assessments has elicited among our community members.

I had the opportunity to visit the lakes alongside Nancy Nguyen, the Trails at Monterey Community Development District's Secretary, and I can confidently attest that the proposed reconstruction is not warranted based on their current condition. Having been a board member for 16 years, I was committed to the responsible management of our community's resources, as such, I visited the lakes often to validate that the maintenance was being conducted properly prior to approving checks issued for monthly maintenance payments.

Regrettably, I will be unable to attend the upcoming August 22, 2023 Public Hearing, due to a pre-existing travel commitment. Considering the importance of this matter and the need for informed decisions, I kindly request that this meeting be structured as an informative session. Moreover, I propose scheduling an additional meeting in the subsequent days to allow all community members a more comprehensive understanding of the proposal put forth by the Trails at Monterey Community Development District.

I appreciate your consideration of my concerns and my request for an additional meeting. Please feel free to contact me for any further clarification or discussion on this matter.

Thank you for your dedication to our community's well-being.

Warm regards,

Ulises Blanco  
305-505-3764

**RESOLUTION NO. 2023-02**

**A RESOLUTION OF THE TRAILS AT MONTEREY COMMUNITY DEVELOPMENT DISTRICT ADOPTING A FISCAL YEAR 2023/2024 BUDGET.**

**WHEREAS**, the Trails at Monterey Community Development District (“District”) has prepared a Proposed Budget and Final Special Assessment Roll for Fiscal Year 2023/2024 and has held a duly advertised Public Hearing to receive public comments on the Proposed Budget and Final Special Assessment Roll; and,

**WHEREAS**, following the Public Hearing and the adoption of the Proposed Budget and Final Assessment Roll, the District is now authorized to levy non ad-valorem assessments upon the properties within the District.

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

**Section 1.** The Final Budget and Final Special Assessment Roll for Fiscal Year 2023/2024 attached hereto as Exhibit “A” is approved and adopted, and the assessments set forth therein shall be levied.

**Section 2.** The 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 22<sup>nd</sup> day of August, 2023.

**ATTEST:**

**TRAILS AT MONTEREY  
COMMUNITY DEVELOPMENT DISTRICT**

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

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

Trails At Monterey  
Community Development District

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



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- II DETAILED FINAL BUDGET
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**FINAL BUDGET**  
**TRAILS AT MONTEREY COMMUNITY DEVELOPMENT DISTRICT**  
**FISCAL YEAR 2023/2024**  
**OCTOBER 1, 2023 - SEPTEMBER 30, 2024**

	<b>FISCAL YEAR 2023/2024 BUDGET</b>
<b>REVENUES</b>	
ADMINISTRATIVE ASSESSMENTS	81,131
MAINTENANCE ASSESSMENTS	516,117
DEBT ASSESSMENTS	219,413
OTHER REVENUES	0
INTEREST INCOME	420
<b>TOTAL REVENUES</b>	<b>\$ 817,081</b>
<b>EXPENDITURES</b>	
<b>MAINTENANCE EXPENDITURES</b>	
AQUATIC/STORMWATER MANAGEMENT	7,350
MITIGATION MAINTENANCE	3,300
LAKE EASEMENT/LANDSCAPE MAINTENANCE	22,000
ENGINEERING/INSPECTIONS	2,500
EROSION CONTROL SHORELINE RESTORATION PROJECT	450,000
<b>TOTAL MAINTENANCE EXPENDITURES</b>	<b>\$ 485,150</b>
<b>ADMINISTRATIVE EXPENDITURES</b>	
SUPERVISOR FEES	5,000
PAYROLL TAXES (EMPLOYER)	400
MANAGEMENT	32,448
SECRETARIAL	3,600
LEGAL	10,500
ASSESSMENT ROLL	6,000
AUDIT FEES	3,700
INSURANCE	6,600
LEGAL ADVERTISING	750
MISCELLANEOUS	1,300
POSTAGE	300
OFFICE SUPPLIES	550
DUES & SUBSCRIPTIONS	175
TRUSTEE FEES	4,260
CONTINUING DISCLOSURE FEE	350
WEBSITE MANAGEMENT	750
<b>TOTAL ADMINISTRATIVE EXPENDITURES</b>	<b>\$ 76,683</b>
<b>TOTAL EXPENDITURES</b>	<b>\$ 561,833</b>
<b>REVENUES LESS EXPENDITURES</b>	<b>\$ 255,248</b>
BOND PAYMENTS	(206,248)
<b>BALANCE</b>	<b>\$ 49,000</b>
COUNTY APPRAISER & TAX COLLECTOR FEE	(16,333)
DISCOUNTS FOR EARLY PAYMENTS	(32,667)
<b>EXCESS/ (SHORTFALL)</b>	<b>\$ -</b>
CARRYOVER FROM PRIOR YEAR	0
<b>NET EXCESS/ (SHORTFALL)</b>	<b>\$ -</b>

**DETAILED FINAL BUDGET**  
**TRAILS AT MONTEREY 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
<b>REVENUES</b>				
ADMINISTRATIVE ASSESSMENTS	60,906	57,438	81,131	Expenditures Less Interest & Carryover/.94
MAINTENANCE ASSESSMENTS	34,186	37,394	516,117	Expenditures/.94
DEBT ASSESSMENTS	219,415	219,413	219,413	Bond Payments/.94
OTHER REVENUES	0	0	0	
INTEREST INCOME	274	300	420	Interest Projected At \$35 Per Month
<b>TOTAL REVENUES</b>	<b>\$ 314,781</b>	<b>\$ 314,545</b>	<b>\$ 817,081</b>	
<b>EXPENDITURES</b>				
<b>MAINTENANCE EXPENDITURES</b>				
AQUATIC/STORMWATER MANAGEMENT	5,532	7,350	7,350	No Change From 2022/2023 Budget
MITIGATION MAINTENANCE	875	3,300	3,300	No Change From 2022/2023 Budget
LAKE EASEMENT/LANDSCAPE MAINTENANCE	15,610	22,000	22,000	No Change From 2022/2023 Budget
ENGINEERING/INSPECTIONS	3,225	2,500	2,500	No Change From 2022/2023 Budget
EROSION CONTROL SHORELINE RESTORATION PROJECT	0	0	450,000	Project To Be Completed In Three To Four Years
<b>TOTAL MAINTENANCE EXPENDITURES</b>	<b>\$ 25,242</b>	<b>\$ 35,150</b>	<b>\$ 485,150</b>	
<b>ADMINISTRATIVE EXPENDITURES</b>				
SUPERVISOR FEES	1,800	5,000	5,000	No Change From 2022/2023 Budget
PAYROLL TAXES (EMPLOYER)	137	400	400	Projected At 8% Of Supervisor Fees
MANAGEMENT	30,600	31,512	32,448	CPI Adjustment (Capped At 3%)
SECRETARIAL	3,600	3,600	3,600	No Change From 2022/2023 Budget
LEGAL	7,842	10,500	10,500	No Change From 2022/2023 Budget
ASSESSMENT ROLL	6,000	6,000	6,000	As Per Contract
AUDIT FEES	3,500	3,600	3,700	\$100 Increase From 2022/2023 Budget
INSURANCE	5,706	6,000	6,600	Fiscal Year 2022/2023 Expenditure Was \$6,134
LEGAL ADVERTISING	354	750	750	No Change From 2022/2023 Budget
MISCELLANEOUS	470	1,550	1,300	\$250 Decrease From 2022/2023 Budget
POSTAGE	221	300	300	No Change From 2022/2023 Budget
OFFICE SUPPLIES	396	600	550	\$50 Decrease From 2022/2023 Budget
DUES & SUBSCRIPTIONS	175	175	175	No Change From 2022/2023 Budget
TRUSTEE FEES	4,256	3,500	4,260	\$760 Increase From 2022/2023 Budget
CONTINUING DISCLOSURE FEE	350	350	350	No Change From 2022/2023 Budget
WEBSITE MANAGEMENT	750	750	750	No Change From 2022/2023 Budget
<b>TOTAL ADMINISTRATIVE EXPENDITURES</b>	<b>\$ 66,157</b>	<b>\$ 74,587</b>	<b>\$ 76,683</b>	
<b>TOTAL EXPENDITURES</b>	<b>\$ 91,399</b>	<b>\$ 109,737</b>	<b>\$ 561,833</b>	
<b>REVENUES LESS EXPENDITURES</b>	<b>\$ 223,382</b>	<b>\$ 204,808</b>	<b>\$ 255,248</b>	
BOND PAYMENTS	(209,170)	(206,248)	(206,248)	2024 Principal & Interest Payments
<b>BALANCE</b>	<b>\$ 14,212</b>	<b>\$ (1,440)</b>	<b>\$ 49,000</b>	
COUNTY APPRAISER & TAX COLLECTOR FEE	(3,028)	(6,285)	(16,333)	Two Percent Of Total Tax Roll
DISCOUNTS FOR EARLY PAYMENTS	(11,648)	(12,570)	(32,667)	Four Percent Of Total Tax Roll
<b>EXCESS/ (SHORTFALL)</b>	<b>\$ (464)</b>	<b>\$ (20,295)</b>	<b>\$ -</b>	
CARRYOVER FROM PRIOR YEAR	0	20,295	0	Carryover From Prior Year
<b>NET EXCESS/ (SHORTFALL)</b>	<b>\$ (464)</b>	<b>\$ -</b>	<b>\$ -</b>	

**DETAILED FINAL DEBT SERVICE FUND BUDGET**  
**TRAILS AT MONTEREY 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
<b>REVENUES</b>				
Interest Income	665	15	100	Projected Interest For 2023/2024
NAV Tax Collection	209,170	206,248	206,248	Maximum Debt Service
<b>Total Revenues</b>	<b>\$ 209,835</b>	<b>\$ 206,263</b>	<b>\$ 206,348</b>	
<b>EXPENDITURES</b>				
Principal Payments	125,000	125,000	135,000	Principal Payment Due In 2024
Interest Payments	81,835	74,491	69,206	Interest Payments Due In 2024
Bond Redemption	0	6,772	2,142	Estimated Excess Debt Collections
<b>Total Expenditures</b>	<b>\$ 206,835</b>	<b>\$ 206,263</b>	<b>\$ 206,348</b>	
<b>Excess/ (Shortfall)</b>	<b>\$ 3,000</b>	<b>\$ -</b>	<b>\$ -</b>	

**Series 2012 Refunding Bonds Information**

Original Par Amount =	\$2,830,000	Annual Principal Payments Due =	May 1st
Interest Rate =	1.75% - 4.25%	Annual Interest Payments Due =	May 1st & November 1st
Issue Date =	May 2012		
Maturity Date =	May 2033		
Par Amount As Of 1/1/23 =	\$1,755,000		

## Trails At Monterey Community Development District Assessment Comparison

	Fiscal Year 2019/2020 <u>Assessment*</u>	Fiscal Year 2020/2021 <u>Assessment*</u>	Fiscal Year 2021/2022 <u>Assessment*</u>	Fiscal Year 2022/2023 <u>Assessment*</u>	Fiscal Year 2023/2024 <u>Projected Assessment*</u>
Administrative	\$ 138.29	\$ 141.98	\$ 145.46	\$ 137.75	<b>\$ 194.56</b>
Maintenance	\$ 89.64	\$ 85.51	\$ 81.99	\$ 89.68	<b>\$ 1,237.70</b>
Debt	<u>\$ 526.17</u>	<u>\$ 526.17</u>	<u>\$ 526.17</u>	<u>\$ 526.17</u>	<u><b>\$ 526.17</b></u>
<b>Total</b>	<b>\$ 754.10</b>	<b>\$ 753.66</b>	<b>\$ 753.62</b>	<b>\$ 753.60</b>	<b>\$ 1,958.43</b>

\* Assessments Include the Following :

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

Community Information:

Total Units                      417

**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 2023/2024 AND SETTING THE TIME AND LOCATION OF SAID DISTRICT MEETINGS; AND PROVIDING AN EFFECTIVE DATE.**

**WHEREAS**, it is necessary for the Trails at Monterey Community Development District ("District") to establish a regular meeting schedule for fiscal year 2023/2024; and

**WHEREAS**, the Board of Supervisors of the District has set a regular meeting schedule, location and time for District meetings for fiscal year 2023/2024 which is attached hereto and made a part hereof as Exhibit "A".

**NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE TRAILS AT MONTEREY COMMUNITY DEVELOPMENT DISTRICT, MIAMI-DADE COUNTY, FLORIDA, AS FOLLOWS:**

**Section 1.** The above recitals are hereby adopted.

**Section 2.** The regular meeting schedule, time and location for meetings for fiscal year 2023/2024 which is attached hereto as Exhibit "A" is hereby adopted and authorized to be published.

**PASSED, ADOPTED and EFFECTIVE** this 22<sup>nd</sup> day of August, 2023.

**ATTEST:**

**TRAILS AT MONTEREY  
COMMUNITY DEVELOPMENT DISTRICT**

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

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

**TRAILS AT MONTEREY COMMUNITY DEVELOPMENT DISTRICT  
FISCAL YEAR 2023/2024 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 165<sup>th</sup> Avenue, Suite 200, Miami, Florida 33193, on the following dates:

**October 24, 2023  
February 27, 2024  
April 23, 2024  
June 25, 2024  
August 27, 2024**

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 Florida 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 [nnguyen@sdsinc.org](mailto:nnguyen@sdsinc.org) 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 [nnguyen@sdsinc.org](mailto:nnguyen@sdsinc.org) 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)

**PUBLISH: MIAMI DAILY BUSINESS REVIEW 10/12/23**

**RESOLUTION 2023-04**

**A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE TRAILS AT MONTEREY COMMUNITY DEVELOPMENT DISTRICT PROVIDING FOR THE APPOINTMENT OF A RECORDS MANAGEMENT LIAISON OFFICER; PROVIDING THE DUTIES OF THE RECORDS MANAGEMENT LIAISON OFFICER; ADOPTING A RECORDS RETENTION POLICY; DETERMINING THE ELECTRONIC RECORD TO BE THE OFFICIAL RECORD; PROVIDING FOR SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE DATE.**

**WHEREAS**, the Trails at Monterey Community Development District (the “District”) is a local unit of special-purpose government created and existing pursuant to Chapter 190, *Florida Statutes*; and

**WHEREAS**, Chapter 190, *Florida Statutes*, authorizes the District to adopt rules to govern the administration of the District and to adopt resolutions as may be necessary for the conduct of District business; and

**WHEREAS**, Section 257.36(5), *Florida Statutes*, requires the District to establish and maintain an active and continuing program for the economical and efficient management of records and to provide for the appointment of a records management liaison officer (“Records Management Liaison Officer”); and

**WHEREAS**, the District desires for the Records Management Liaison Officer to be an employee of the District or an employee of the District Manager; and

**WHEREAS**, the District desires to authorize the District’s records custodian to appoint a Records Management Liaison Officer, which may or may not be the District’s records custodian; and

**WHEREAS**, the District desires to prescribe duties of the Records Management Liaison Officer and provide for the assignment of additional duties; and

**WHEREAS**, the District’s Board of Supervisors (“Board”) finds that it is in the best interests of the District to adopt by resolution a records retention policy (the “Records Retention Policy”) for immediate use and application.

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

**SECTION 1.** The District hereby authorizes the District’s records custodian to appoint a Records Management Liaison Officer and report such appointment to the appropriate State of Florida agencies. A Records Management Liaison Officer shall be an employee of the District or the District Manager. The Board, and the District’s records custodian, shall each have the individual power to remove the Records Management



Liaison Officer at any time for any reason. Immediately following the removal or resignation of a Records Management Liaison Officer, the District's records custodian shall appoint a replacement Records Management Liaison Officer.

**SECTION 2.** The duties of the Records Management Liaison Officer shall include the following:

- A.** Serve as the District's contact with the Florida Department of State, State Library and Archives of Florida;
- B.** Coordinate the District's records inventory;
- C.** Maintain records retention and disposition forms;
- D.** Coordinate District records management training;
- E.** Develop records management procedures consistent with the Records Retention Policy, as amended as provided herein;
- F.** Participate in the development of the District's development of electronic record keeping systems;
- G.** Submit annual compliance statements;
- H.** Work with the Florida Department of State, State Library and Archives of Florida to establish individual retention schedules for the District, from time to time and as may be necessary; and
- I.** Such other duties as may be assigned by the Board or the District's records custodian in the future.

**SECTION 3.** The District hereby adopts as its Records Retention Policy the applicable provisions of Section 257.36(5), *Florida Statutes*, the rules adopted by the Division of Library and Information Services of the Department of State ("Division") pursuant to Section 257.36, *Florida Statutes*, and the General Records Schedules established by the Division. However, the District will retain certain records longer than required by the General Records Schedules established by the Division as set forth in Exhibit A. To the extent the above statute, rules or schedules are amended or supplemented in the future, the District's Records Retention Policy shall automatically incorporate such amendment or supplement provided that such automatic amendment shall not reduce the retention times set forth in Exhibit A. The Records Retention Policy shall remain in full force and effect until such time as the Board amends the Policy.

**SECTION 4.** In accordance with section 668.50, Florida Statutes, and section 119.01, Florida Statutes, the Board finds that the electronic record shall be considered the official record and any paper originals are hereby duplicates which may be disposed of unless required to be preserved by any applicable statute, rule or ordinance.

**SECTION 5.** If any provision of this resolution is held to be illegal or invalid, the other provisions shall remain in full force and effect.

**SECTION 6.** This Resolution shall become effective upon its passage; shall replace, supplant, and supersede any prior policy or resolution of the District regarding records retention; and shall remain in effect unless rescinded or repealed.

**PASSED AND ADOPTED** at a meeting of the District Board of Supervisors, this 22<sup>nd</sup> day of August, 2023.

ATTEST:

**TRAILS AT MONTEREY  
COMMUNITY DEVELOPMENT  
DISTRICT**

\_\_\_\_\_

\_\_\_\_\_

Print name: \_\_\_\_\_  
Secretary / Assistant Secretary

Print name: \_\_\_\_\_  
Chair / Vice Chair

Exhibit A: Amendments to General Records Schedules Established by the Division

**Exhibit A**

**Amendments to General Records Schedules established by the Division**

**ADVERTISEMENTS: LEGAL (Item #25)**

The District shall retain mailed and published legal advertisements, and corresponding affidavits, relating to proceedings under uniform method of collection of debt assessments permanently. The District shall retain mailed and published legal advertisements, and corresponding affidavits, relating to the levy of assessments securing bonds for five (5) fiscal years provided applicable audits have been released, or until three (3) calendar years after related bonds are redeemed, whichever is later.

**AUDITS: INDEPENDENT (Item #56)**

The District shall retain the record copy of independent audits for ten (10) fiscal years or until three (3) calendar years after all related bonds are redeemed, whichever is later.

**DISBURSEMENT RECORDS: DETAIL (Item #340)**

The District shall retain the record copy of disbursement records relating to the use of bonds for five (5) fiscal years provided applicable audits have been released or until three (3) calendar years after related bonds are redeemed, whichever is later.

**DISBURSEMENT RECORDS: SUMMARY (Item #341)**

The District shall retain the record copy of disbursement records relating to the use of bonds for ten (10) fiscal years provided applicable audits have been released or until three (3) calendar years after related bonds are redeemed, whichever is later.

**FINANCIAL REPORTS: LOCAL GOVERNMENT ANNUAL REPORTS (Item #107)**

The District shall retain the record copy of disbursement records relating to the use of bonds for ten (10) fiscal years provided applicable audits have been released or until three (3) calendar years after all related bonds are redeemed, whichever is later.

**INCIDENT REPORT FILES (Item #241)**

The District shall retain incident reports for five (5) anniversary years from the date of the incident.

**MINUTES: OFFICIAL MEETINGS (PRELIMINARY/AUDIO RECORDINGS/VIDEO RECORDINGS (Item #4)**

The District shall retain audio recordings of board of supervisor meetings for five (5) calendar years after adoption of the official minutes.

**PROJECT FILES: CAPITAL IMPROVEMENT (Item #136)**

The District shall retain the record copy of project files for projects funded with bonds for ten (10) fiscal years after completion of the project provided applicable audits have been released or until three (3) calendar years after all related bonds are redeemed, whichever is later.

**REAL PROPERTY RECORDS: CONDEMNATION/DEMOLITION (Item #364)**

The District shall retain the record copy of project files for condemnation/demolition projects funded with bonds for five (5) anniversary years after final action or until three (3) calendar years after all related bonds are redeemed, whichever is later. The record copy of deeds and easements shall be kept permanently.

**REAL PROPERTY RECORDS: PROPERTY ACQUIRED (Item #172)**

The District shall retain the record copy of documents related to property acquisitions funded with bonds for three (3) fiscal years after final disposition of the property provided applicable audits have been released or until three (3) calendar years after all related bonds are redeemed, whichever is later. The record copy of deeds and easements shall be kept permanently.

**TRAILS AT MONTEREY COMMUNITY DEVELOPMENT DISTRICT  
AUDITOR SELECTION  
EVALUATION CRITERIA**

**1. *Ability of Personnel (10 Points).***

(E.g., geographic locations of the firm's headquarters or permanent office in relation to the project; capabilities and experience of key personnel; evaluation of existing work load; proposed staffing levels, etc.)

**2. *Proposer's Experience (10 Points).***

(E.g. past record and experience of the Proposer in similar projects; volume of work previously performed by the firm; past performance for other Community Development Districts in other contracts; character, integrity, reputation of Proposer, etc.)

**3. *Understanding of Scope of Work (10 Points).***

Extent to which the proposal demonstrates an understanding of the District's needs for the services requested.

**4. *Ability to Furnish the Required Services (10 Points).***

Present ability to manage this project and the extent to which the proposal demonstrates the adequacy of Proposer's financial resources and stability as a business entity necessary to complete the services required (E.g. the existence of any natural disaster plan for business operations).

**5. *Price (10 Points).***

Points will be awarded based upon the price bid for the rendering of the services and reasonableness of the price to the services.

**TRAILS AT MONTEREY COMMUNITY DEVELOPMENT DISTRICT  
REQUEST FOR PROPOSALS**

**District Auditing Services for Fiscal Years 2022/2023, 2023/2024 and 2024/2025  
With Two Year Option (2025/2026 and 2026/2027)  
Miami-Dade County, Florida**

**TRAILS AT MONTEREY COMMUNITY DEVELOPMENT DISTRICT  
AUDITOR SELECTION INSTRUCTIONS TO PROPOSERS**

**SECTION 1. DUE DATE.** Sealed proposals must be received no later than September 27, 2023 at 4:00 p.m., at the offices of District Manager, located at 2501A Burns Road, Palm Beach Gardens, Florida 33410.

**SECTION 2. FAMILIARITY WITH THE LAW.** By submitting a proposal, the Proposer is affirming its familiarity and understanding with all federal, state, and local laws, ordinances, rules and regulations that in any manner affect the work. Ignorance on the part of the Proposer will in no way relieve it from responsibility to perform the work covered by the proposal in compliance with all such laws, ordinances and regulations.

**SECTION 3. QUALIFICATIONS OF PROPOSER.** The contract, if awarded, will only be awarded to a responsible Proposer who is qualified by experience and licensing to do the work specified herein. The Proposer shall submit with its proposal satisfactory evidence of experience in similar work and show that it is fully prepared to complete the work to the satisfaction of the District.

**SECTION 4. REJECTION OF PROPOSAL.** Proposers shall be disqualified and their proposals rejected if the District has reason to believe that collusion may exist among the Proposers, the Proposer has defaulted on any previous contract or is in arrears on any previous or existing contract, or for failure to demonstrate proper licensure and business organization.

**SECTION 5. SUBMISSION OF PROPOSAL.** Submit two (2) copies of the Proposal Documents and one digital copy, and other requested attachments at the time and place indicated herein, which shall be enclosed in an opaque sealed envelope, marked with the title “Auditing Services – Trails At Monterey Community Development District” on the face of it.

**SECTION 6. MODIFICATION AND WITHDRAWAL.** Proposals may be modified or withdrawn by an appropriate document duly executed and delivered to the place where proposals are to be submitted at any time prior to the time and date the proposals are due. After proposals are opened by the District, no proposal may be withdrawn for a period of ninety (90) days.

**SECTION 7. PROPOSAL DOCUMENTS.** The proposal documents shall consist of the notice announcing the request for proposals, these instructions, the Evaluation Criteria Sheet and a proposal with all required documentation pursuant to Section 12 of these instructions (the “Proposal Documents”).

**SECTION 8. PROPOSAL.** In making its proposal, each Proposer represents that it has read and understands the Proposal Documents and that the proposal is made in accordance therewith.

**SECTION 9. BASIS OF AWARD/RIGHT TO REJECT.** The District reserves the right to reject any and all proposals, make modifications to the work, and waive any informalities or irregularities in proposals as it is deemed in the best interests of the District.

**SECTION 10. CONTRACT AWARD.** Within fourteen (14) days of receipt of the Notice of Award from the District, the Proposer shall enter into and execute a Contract (engagement letter) with the District.

**SECTION 11. LIMITATION OF LIABILITY.** Nothing herein shall be construed as or constitute a waiver of District’s limited waiver of liability contained in section 768.28, Florida Statutes, or any other statute or law.

**SECTION 12. MISCELLANEOUS.** All proposals shall include the following information in addition to any other requirements of the proposal documents.

- A. List position or title of all personnel to perform work on the District audit. Include resumes or each person listed; list years of experience in present position for each party listed and years of related experience.
- B. Describe proposed staffing levels, including resumes with applicable certifications.
- C. Three references from projects of similar size and scope. The Proposer should include information relating to the work it conducted for each reference as well as a name, address and phone number of a contact person.

**SECTION 13. PROTESTS.** Any protest regarding the Proposal Documents, must be filed in writing, at the offices of the District Manager, within seventy-two (72) hours after receipt of the Request for Proposals and Evaluation Criteria or other contract documents. The formal protest setting forth with particularity the facts and law upon which the protest is based shall be filed within seven (7) calendar days after the initial notice of protest was filed. Failure to timely file a notice of protest or failure to timely file a formal written protest shall constitute a waiver of any right to object or protest with respect to the aforesaid Request for Proposals, Evaluation Criteria, or other contract documents.

**SECTION 14. EVALUATION OF PROPOSALS.** The criteria to be used in the evaluation are presented in the Evaluation Criteria Sheet, contained within the Proposal Documents.

**SECTION 15. REJECTION OF ALL PROPOSALS.** The District reserves the right to reject any and all bids, with or without cause, and to waive technical errors and informalities, as determined to be in the best interests of the District.