SUMMERVILLE COMMUNITY DEVELOPMENT DISTRICT

MIAMI-DADE COUNTY

REGULAR BOARD MEETING

JUNE 4, 2025

9:00 A.M.

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

www.summervillecdd.org
561.630.4922 Telephone
877.SDS.4922 Toll Free
561.630.4923 Facsimile

AGENDA
SUMMERVILLE COMMUNITY DEVELOPMENT DISTRICT
Kendall Executive Center
8785 SW 165th Avenue, Suite 200
Miami, Florida 33193
Call-In: 800-743-4099 Participant Code: 2057038#
REGULAR BOARD MEETING
June 4, 2025
9:00 a.m.

A. Call to Order
B. Proof of Publication……...Page 1
C. Establish Quorum
D. Additions or Deletions to Agenda
E. Comments from the Public for Items Not on the Agenda
F. Approval of Minutes
    1. April 2, 2025 Regular Board Meeting……..…….Page 2
G. Old Business
    1. Discussion Regarding Encroachment Letters…….Page 10
    2. Discussion Regarding Sidewalk Milling & Arborist Report……..Page 12
    3. Discussion Regarding EV Charging Stations (Barbara Tomas)
    4. Discussion Regarding Signs on District Tracts (Barbara Tomas)
    5. Update Regarding Fire Ants
    6. Update Regarding Tree Trimming
    7. Discussion Regarding Use of Open Tracts (Playground)……Page 51
    8. Update Regarding Holiday Lighting
H. New Business
    1. Consider Resolution No. 2025-04 – Adopting a Fiscal Year 2025/2026 Proposed Budget……Page 61
I. Administrative & Operational Matters
    1. Reminder: 2024 Form 1 – Statement of Financial Disclosure (Due by July 1, 2025)
J. Board Member and Staff Closing Comments
K. Adjourn

McClatchy

The Beaufort Gazette
The Belleville News-Democrat
Bellingham Herald
Centre Daily Times
Sun Herald
Idaho Statesman
Bradenton Herald
The Charlotte Observer
The State
Ledger-Enquirer

Durham | The Herald-Sun
Fort Worth Star-Telegram
The Fresno Bee
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AFFIDAVIT OF PUBLICATION

Account #	Order Number	Identification	Order PO	Amount	Cols	Depth
142066	593549	Print Legal Ad-IPL01946470 - IPL0194647		$746.52	2	50 L

Attention: Laura J. Archer

Summerville Community Development District
c/o Special District Services, Inc.
2501A Burns Road
Palm Beach Gardens, Florida 33410
LArcher@sdsinc.org

SUMMERVILLE COMMUNITY DEVELOPMENT DISTRICT
FISCAL YEAR 2024/2025 REGULAR MEETING SCHEDULE

NOTICE IS HEREBY GIVEN that the Board of Supervisors (the "Board") of the **Summerville Community Development District** (the "District") will hold Regular Meetings in the Kendall Executive Center located at 8785 SW 165th Avenue, Suite 200, Miami, Florida 33193 at **9:00 a.m.** on the following dates

October 2, 2024
November 6, 2024
February 5, 2025
March 5, 2025
April 2, 2025
May 7, 2025
June 4, 2025
September 3, 2025

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

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

If any person decides to appeal any decision made with respect to any matter considered at these meetings, such person will need a record of the proceedings and such person may need to ensure 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 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 with no advertised notice.

SUMMERVILLE COMMUNITY DEVELOPMENT DISTRICT
www.summervillecdd.org

IPL0194647
Sep 19 2024

PUBLISHED DAILY
MIAMI-DADE-FLORIDA

STATE OF FLORIDA
COUNTY OF MIAMI-DADE

Before the undersigned authority personally appeared: Mary Castro, who on oath says that he/she is CUSTODIAN OF RECORDS of The Miami Herald, a daily newspaper published at Miami in Miami-Dade County, Florida; that the attached copy of the advertisement that was published was published in said newspaper in the issue (s) of:

Publication: Miami Herald

1 insertion(s) published on:

09/19/24

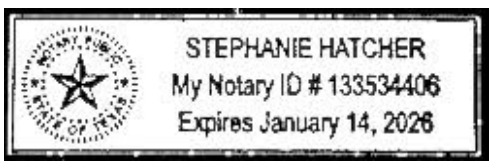
Affiant further says that the said Miami Herald is a newspaper published at Miami, in the said Miami-Dade County, Florida and that the said newspaper has heretofore been continuously published in said Dade County, Florida each day and has been entered a second class mail matter at the post office in Miami, in said Miami-Dade County, Florida, for a period of one year next preceding the first publication of the attached copy of advertisement; and affiant further says that he/she has neither paid or promised any person, firm or corporation any discount, rebate, commission or refund for the purpose of securing this advertisement for publication in the said newspaper(s).The McClatchy Company complies with all legal requirements for publication in chapter 50, Florida Statutes.

Mary Castro

Sworn to and subscribed before me this 19th day of September in the year of 2024

Stephanie Hatcher

Notary Public in and for the state of Texas, residing in Dallas County



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SUMMERVILLE COMMUNITY DEVELOPMENT DISTRICT
REGULAR BOARD MEETING
APRIL 2, 2025

A. CALL TO ORDER

The April 2, 2025, Regular Board Meeting of the Summerville Community Development District (the "District") was called to order at 9:03 a.m. in the Kendall Executive Center located at 8785 SW 165 Avenue, Suite 200, Miami, Florida 33193.

B. PROOF OF PUBLICATION

Ms. Nguyen presented proof of publication that notice of the Regular Board Meeting had been published in the *Miami Herald* on September 19, 2024, as part of the District's fiscal year 2024/2025 meeting schedule, as legally required.

C. ESTABLISH A QUORUM

Ms. Nguyen determined that the attendance of Chairwoman Barbara Tomas, and Supervisors Larry Gordon and Wilder Leon 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.

Also physically in attendance were: James Miller, of Miami, Florida and Melkys Martinez, of Miami, Florida.

Also in attendance via conference call were: Maximiliano Gentile, of Miami, Florida; Nelson Devicenci, of Miami, Florida; Daniel Castillo of Miami, Florida; Yessenia Brown of Miami, Florida; and Rafael Escorcia of Miami, Florida.

D. CONSIDER RESOLUTION NO. 2025-01 – DECLARING VACANCIES (SEATS 1, 3 & 4)

Ms. Nguyen presented Resolution No. 2025-01, entitled:

RESOLUTION NO. 2025-01

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE SUMMERVILLE COMMUNITY DEVELOPMENT DISTRICT DECLARING VACANCIES ON THE BOARD OF SUPERVISORS PURSUANT TO SECTION 190.006(3)(b), FLORIDA STATUTES; AND PROVIDING AN EFFECTIVE DATE.

Ms. Nguyen provided an explanation for the document and advised that the 4-year terms of office for Seat 1 (currently held by Barbara Tomas), Seat 3 (currently held by Larry Gordon) and Seat 4 (currently vacant) expired in November 2024. She further explained that no elector qualified for Seat 1, 3, or 4 to be filled in the General Election. Pursuant to Section 190.006(3)(b), Florida Statutes, the District is required to declare the seats to be filled by the election to which no qualified elector has

qualified as vacant and to appoint a qualified elector to fill each such vacancy within ninety (90) days of the second Tuesday following the General Election. Until such appointment, the incumbent board member in such seat shall remain in office.

A **motion** was made by Ms. Tomas, seconded by Mr. Gordon and unanimously passed to declare Seat 1, Seat 3, and Seat 4 as vacant effective November 19, 2024 and further authorizing incumbent board members in these seats to remain in office until the appointment of a qualified elector to such seats.

E. CONSIDER RESIGNATION (BRYAN ROSALES, SEAT 5, EFFECTIVE 12/31/24)

Ms. Nguyen stated that she was in possession of a resignation letter from Bryan Rosales with an effective date of December 31, 2024, and it would be in order for the Board of Supervisors (the "Board") to consider.

A **motion** was made by Mr. Leon, seconded by Mr. Gordon and unanimously passed to accept the resignation of Bryan Rosales from Seat 5, effective December 31, 2024.

Ms. Nguyen stated that there was now a vacancy in Seat 5, which expires in November 2026.

F. CONSIDER APPOINTMENTS TO VACANT SEASTS (SEATS 1, 3, 4 & 5)

Ms. Nguyen stated that vacancies had been declared in Seats 1, 3, and 4, effective as of the second Tuesday of November (November 19, 2024) following the November General Election (November 5, 2024). Pursuant to Section 190.006(3)(b), Florida Statutes, incumbents (holdover Board Members) will serve no longer than ninety (90) days (from November 19, 2024) or until appointments to the vacancies have been made. Ms. Nguyen stated that there is also a vacancy in Seat 5. A discussion ensued after which:

A **motion** was made by Mr. Gordon, seconded by Mr. Leon and unanimously passed to appoint Barbara Tomas to Seat 1, which term expires in November 2028.

Ms. Nguyen, Notary Public in the State of Florida, administered the Oath of Office to Ms. Tomas.

A **motion** was made by Ms. Tomas, seconded by Mr. Leon and unanimously passed to appoint Larry Gordon to Seat 3, which term expires in November 2028.

Ms. Nguyen, Notary Public in the State of Florida, administered the Oath of Office to Mr. Gordon.

Ms. Nguyen asked if there were any qualified persons in attendance who would like to serve on the Board. Mr. Nelson Devicenci stated that he would like to serve on the Board. It was explained that he is unable to serve on the Board because he is considered a relative, per Chapter 112.3135, Florida Statutes. Ms. Nguyen informed the Board that Mr. James Miller contacted her to express his desire to serve on the Board. Mr. Miller provided an introduction of himself and expressed his desire to serve on the Board. A discussion ensued, after which:

A **motion** was made by Mr. Gordon, seconded by Mr. Leon and unanimously passed to appoint James Miller to Seat 4, which term expires in November 2028.

Ms. Nguyen, Notary Public in the State of Florida, administered the Oath of Office to Mr. Miller. In addition, Ms. Wald and Ms. Nguyen will review the duties and responsibilities as a Board member

with emphasis on the Sunshine Law, Financial Disclosure for Public Officials (2024 Form 1 must be completed electronically through the Florida Commission on Ethics Electronic Financial Disclosure Management System within thirty (30) days of appointment), and the Code of Ethics for Public Officials following the meeting.

G. ADMINISTER OATH OF OFFICE AND REVIEW BOARD MEMBER RESPONSIBILITIES AND DUTIES

This item was discussed during item F.

H. ELECTION OF OFFICERS

As a result of the changes to the Board of the District, Ms. Nguyen recommended that re-election of the District's Officers take place. She provided the following slate of names for election:

- Chairwoman – Barbara Tomas
- Vice Chairman – Larry Gordon
- Secretary/Treasurer – Nancy Nguyen
- Assistant Secretaries –Wilder Leon, James Miller, Armando Silva and Gloria Perez

A **motion** was made by Ms. Tomas, seconded by Mr. Leon and passed unanimously to elect the District's Officers, as listed above.

I. ADDITIONS OR DELETIONS TO THE AGENDA

Ms. Nguyen asked if there were any additions or deletions to the agenda.

Ms. Tomas requested that the following items be added to the agenda:

- Installation of EV stations on District tracts.
- Discussion Regarding District Signs on District Tracts.
- Discussion Regarding Sidewalks.

Ms. Nguyen acknowledged Ms. Tomas' request and added the following:

- New Business, Item 6: Discussion Regarding EV Station Installation
- New Business, Item 7: Discussion Regarding Signs
- New Business, Item 8: Discussion Regarding Sidewalks

Mr. Miller stated that he would like to discuss emergency vehicles traveling through the community. Ms. Nguyen added the following item to the agenda:

- New Business, Item 9: Discussion Regarding Motorists in the Community

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

Ms. Nguyen asked if there were any comments from members of the public in attendance.

Mr. Daniel Castillo requested that a discussion regarding fire ants in the open tracts be added to the agenda. Ms. Nguyen added the following item to the agenda:

- New Business, Item 10: Discussion Regarding Fire Ants

Mr. Nelson Devicenci requested that a discussion regarding trees be added to the agenda. Ms. Nguyen added the following item to the agenda:

- New Business, Item 11: Discussion Regarding Trees

Mr. Rafael Escorcia requested that a discussion regarding adding recreational features be added to the agenda. Ms. Nguyen added the following item to the agenda:

- New Business, Item 12: Discussion Regarding Use of Open Tracts

Ms. Tomas requested that a discussion regarding holiday lighting be added. Ms. Nguyen added the following item to the agenda.

- New Business, Item 13: Discussion Regarding Holiday Lighting

K. APPROVAL OF MINUTES

1. October 2, 2024, Regular Board Meeting

Ms. Nguyen presented the minutes of October 2, 2024, Regular Board Meeting and asked if there were any changes.

There being no changes, a **motion** was made by Mr. Gordon, seconded by Ms. Tomas and passed unanimously approving the minutes of the October 2, 2024, Regular Board Meeting, as presented.

L. OLD BUSINESS

1. Staff Report, as Required

There was no staff report at this time.

M. NEW BUSINESS

1. Discussion Regarding Irrigation System Handhole Covers

Ms. Nguyen explained that it was noticed that there were several broken handhole covers in the open tracts in Phase II. She further explained that Landscape Workshop performed an inspection and provided a proposal for the replacement of ten (10) handhole covers. Upon further inspection, there were a total of 15 handhole covers in need of replacement, however, Landscape Workshop only billed for 10 as a courtesy to the District.

2. Discussion Regarding Encroachment Letters

Ms. Nguyen informed the Board that a recent inspection concluded that there are two parcels encroaching onto District owned land. Ms. Nguyen stated that letters have been sent to these homeowners requesting that the encroachments be removed and the District's land be returned to its original condition. More information on this item will be provided at a future meeting.

3. Discussion Regarding Sidewalk Milling

Ms. Nguyen informed the Board that a sidewalk trip hazard is being performed today. Once the inspection is complete, proposals will be requested and presented to the Board for consideration.

Mr. Nelson Devicenci explained that if the District continues to mill the trip hazards, the sidewalk slab will eventually become so weakened that the District will need to replace the whole slab. He further recommended that the Board address the underlying cause of the issue, which is the tree roots. The Board agreed with Mr. Devicenci.

It was discussed that the first step to the process would be to attain a certified arborist report detailing the condition of the trees. The costs for the possible mitigation recommendations from the arborist were also discussed. The Board consensus was to proceed with the process.

A **motion** was made by Mr. Miller setting a not to exceed amount of $3,500 for a certified arborist report, and further authorizing the District Manager to select the most favorable arborist on behalf of the District. The motion was not considered due to a lack of a second.

A discussion ensued, after which:

A **motion** was made by Mr. Leon, seconded by Mr. Miller setting a not to exceed amount of $3,500 for a certified arborist report, and further authorizing the District Manager to select the most favorable arborist on behalf of the District. The motion failed 2 to 2 with Ms. Tomas and Mr. Gordon dissenting.

A discussion ensued, after which:

A **motion** was made by Ms. Tomas, seconded by Mr. Gordon and unanimously passed setting a not to exceed amount of $3,000 for a certified arborist report, and further authorizing the District Manager to select the most favorable arborist on behalf of the District.

The Board requested that Ms. Nguyen email them the proposals after she has made her arborist selection. Ms. Nguyen acknowledged the Board's request.

More information on this item will be provided at a future meeting.

4. Consider Resolution No. 2025-02 – Adopting a Fiscal Year 2025/2026 Proposed Budget

The Board consensus was not to discuss the fiscal year 2025/2026 Proposed Budget until the add-on items are discussed, and proposals for the items discussed are reviewed.

5. Consider Resolution No. 2025-03 – Registered Agent Change

Ms. Nguyen presented Resolution No. 2025-03, entitled:

RESOLUTION 2025-03

A RESOLUTION OF THE SUMMERVILLE COMMUNITY DEVELOPMENT DISTRICT DESIGNATING MICHAEL J. PAWELCZYK AS THE DISTRICT'S REGISTERED AGENT AND DESIGNATING THE OFFICE OF BILLING, COCHRAN, LYLES, MAURO & RAMSEY, P.A. AS THE REGISTERED OFFICE

Ms. Wald explained that Florida Statutes requires that the District designate a registered office and registered agent for the purpose of accepting service of process, notice, or demand that is required by law to be served upon the District. She further explained that it is necessary to designate a new registered agent and update the business address of the registered office.

A **motion** was made by Mr. Gordon, seconded by Ms. Tomas and unanimously passed designating Michael J. Pawelczyk as the Summerville Community Development District registered agent, and designating the registered office at Billing, Cochran, Lyles, Mauro & Ramsey, P.A., 515 East Las Olas Boulevard, Suite 600, Fort Lauderdale, Florida 33301.

6. **ADD-ON: Discussion Regarding EV Station Installation**

Ms. Tomas requested that the District consider the addition of EV stations on the District's open tracts. Ms. Tomas further explained that there are no easily accessible EV stations in the near vicinity of the community. She further explained that she has heard that FPL offers a program where FPL installs and maintains the EV stations. It was requested that Ms. Nguyen attain more information on the program. More information on this item will be provided in a future meeting.

7. **ADD-ON: Discussion Regarding Signs**

Mr. Tomas explained that she has noticed spots on some of the recently installed District signs in the main open tracts in both Phase I and Phase II. Mr. Gordon stated that he has noticed the same and explained that it appears to be rust. Ms. Nguyen stated that she will have the signs inspected and will provide her feedback in a future meeting.

8. **ADD-ON: Discussion Regarding Sidewalks**

This item was added at the request of Ms. Tomas.

This item was discussed during New Business, Item 3.

9. **ADD-ON: Discussion Regarding Motorists in the Community**

Mr. Miller explained that he has witnessed street signs being damaged by large emergency vehicles traveling through the community. Mr. Miller asked if there is anything the District can do to prevent this from occurring in the future. Ms. Nguyen explained that the streets in the community are considered public roads and are owned by Miami-Dade County (the "County"), as such, there is nothing that the District can do to prevent large emergency vehicles from using the streets throughout the community. It was recommended that damages be reported to the County.

10. **ADD-ON: Discussion Regarding Fire Ants**

Mr. Daniel Castillo explained that he has noticed a substantial amount of fire ants throughout the open tracts in the community. It was explained that based on the Landscape Maintenance Agreement between the District and Summerville Homeowner's Association, Inc. (the "HOA") this should be addressed by the HOA. Ms. Nguyen explained that she will report this to the HOA Manager.

11. ADD-ON: Discussion Regarding Trees

Mr. Devicenci asked who is responsible for the tree trimming. It was explained that per the Agreement between the District and the HOA, the HOA is responsible for the tree trimming. Mr. Devicenci recommended that the landscaping services be monitored because he has noticed that there are a lot of trees that are blocking the streetlights, resulting in dark areas throughout the community. Ms. Nguyen stated that she will report this to the HOA Manager.

12. ADD-ON: Discussion Regarding Use of Open Tracts

Mr. Rafael Escorcia asked if the District is able to add recreational features in the District's open tracts. It was explained that the District can consider adding recreational features, but it should be noted that the District will be responsible for the maintenance of any features installed. The Board requested that Ms. Nguyen provide cost estimates for the installation of a playground for children 2-10 years old, as well as the installation of park benches. Ms. Nguyen acknowledged the Board's request.

13. ADD-ON: Discussion Regarding Holiday Lighting

Ms. Tomas requested that the District consider holiday lighting for this upcoming holiday season. She indicated adding holiday lighting in the medians at the entrances of the community as well as lighting in the circle in Phase I. Ms. Nguyen explained that these tracts are not owned by the District. This item will be forwarded to the HOA for consideration.

N. ADMINISTRATIVE & OPERATIONAL MATTERS

1. Staff Report, as Required

There were no administrative or operational matters to discuss at this time.

O. BOARD MEMBER & STAFF CLOSING COMMENTS

Mr. Miller thanked the Board members for the opportunity to serve his community.

There were no additional Board member closing comments.

Ms. Nguyen asked if there were any closing comments from members of the public in attendance. There were no comments from members of the public in attendance.

P. ADJOURNMENT

There being no further business to come before the Board, a **motion** was made by Ms. Tomas, seconded by Mr. Miller and unanimously passed adjourning the Regular Board Meeting at approximately 10:44 a.m.

_____	_____
Secretary/Assistant Secretary	Chairperson/Vice Chairperson

Summerville Community Development District
c/o Special District Services, Inc.
2501A Burns Road
Palm Beach Gardens, FL 33410

February 26, 2025

Property Owner/Resident
11607 SW 246 Terrace
Miami, FL 33032

Re: Common Area Encroachment

Dear Property Owner/Resident,

This firm serves as District Manager for the Summerville Community Development District (the "District"). It has come to our attention that certain encroachments, and in particular a section of fence (the "Improvements"), were installed by you on District property without permission. Therefore, while the District has no objection to the Improvements located on your lot/property at the above described address, the District respectfully requests that those Improvements encroaching into Tract "X" at the west side of your property be removed within thirty (30) days from the date of this correspondence and the property restored to its original condition. The District owns this property by virtue of a special warranty deed dated October 25, 2017 and recorded at ORB 30810 Pages 4566-4569 of the Public Records of Miami-Dade County, Florida.

Should you fail to remove the specified Improvements within the time period set hereinabove and should the District be required to take action to remove said Improvements, such removal will be at your cost and expense. Accordingly, please remove the specified Improvements located on District property and restore Tract "X" within the time frame set in this correspondence. Upon compliance with the District's request, please contact our office to verify the same.

Your cooperation in this important matter is appreciated and should you have any questions regarding this information please do not hesitate to contact me, at 786-609-8717.

Sincerely,

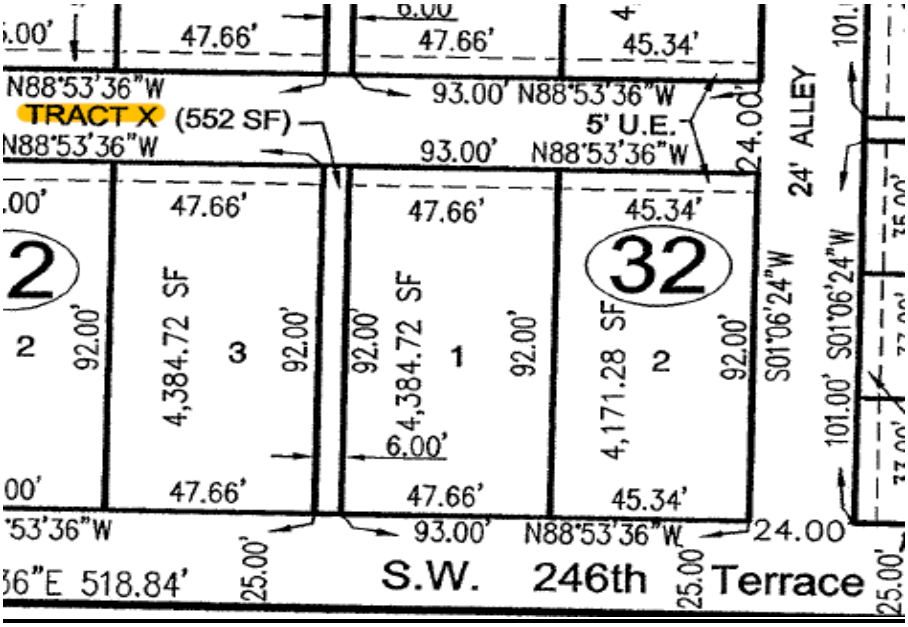
Ryan Quiroga

Rya Quiroga
Field Operations Manager

Cc: Nancy Nguyen, District Manager
Enc: Pictures

IMPROVEMENTS

PLAT EXTRACT



David M. Waddell Consulting, Inc
ISA Certified Arborist
14721 SW 148 Ave.
Miami, FL 33196

5/5/25

Board of Supervisors, Summerville CDD
c/o Nancy Nguyen, District Manager
Special District Services
8785 SW 165 Ave. #200
Miami, FL 33193

RE: Arborist Consulting Report concerning ornamental trees under CDD's jurisdiction at Summerville CDD

Phases 1 and 2.

REPORT

Summary

I have surveyed the above property's trees on multiple visits in April 2025 to perform an evaluation of the existing ornamental trees under the CDD's responsibilities for Phase 1 and 2. Trees surveyed included Green Buttonwood (Conocarpus erectus), Gumbo limbo (Bursera simaruba), Live Oak (Quercus virginiana), Mahogany (Swietenia mahogoni) and other miscellaneous varieties planted by homeowners on CDD property.

The main concerns in both sections are caused by inadequate swale tree planting space and future mature canopy size in the areas fronting the townhomes for the species of trees planted. Swales are the green strips between street and sidewalk. Mature canopy concerns include future vehicle clearance, extended surface roots and proximity to the townhomes.

All of the above trees have or will develop large surface roots that extend out to and beyond the trees' canopy drip line and radiate out in a 360-degree spread. As these trees mature, roots will enlarge and lift the sidewalks creating trip and fall hazards subjecting the CDD to probable legal personal and property liability claims and infrastructure repair costs.

Mature canopies will also widen out over the street and reach the townhome units if not maintained. Large trucks will need clearance of 13'-15', thus canopies of all trees will have to be lifted to this height.

Phase 1 has 58 problem site areas where 48 trees need mitigation and 10 needing removal and replacement. Suggested mitigation requires root pruning along sidewalk and installation of a 13'-15' root barrier with future canopy structural pruning focuses on height and width controls. Removal/replacement is due to a critical lack of root planting area with replacement using smaller native species. See spreadsheet table and images for **tree root mitigation** locations included in this report.

Phase 2 trees, younger Live Oaks recently planted and trimmed do not need any mitigation in the next 3-year window. However, in year 4, structure prune all swale trees, as discussed below. Trees in non-swale green spaces have adequate planting space to accommodate their mature size with minimal care.

Based on my observations, I am recommending for Phase 1 that 10 trees be removed and replaced at this time due to inadequate planted space and while the County's tree replacement requirement will be most economical to CDD. The next priority is root barrier installation for 37 Gumbo and oak sidewalks. Year 2, canopy pruning of Gumbo limbo and Live oak and root barriers for the Green buttonwood. Buttonwoods to be canopy pruned in year 3.

Pruning to follow ANSI A 300 canopy pruning guidelines, creating single leaders, removal of codominant branches and branch inclusions. See attached **Developing a Preventive Program for Young Trees**, UF publication ENH 1062 for details.

Miscellaneous observations:
Trees have recently been mulched. It is detrimental to trees piling the mulch up against the tree trunk. This causes long term damage to the trees by creating a foundation for girdling roots which will grow over and damage the structural roots which are already site compromised. Mulch should be no closer to the trunk than 8 inches away and extend out to the tree drip line with 3"- 4" of organic material. The thickness of the mulch layer helps roots conserve water during dry season; protects root damage caused by maintenance, and decomposes to generate a better soil environment benefiting the tree.

Assignment
My assignment was to inspect and evaluate the ornamental trees under the CDDs control and prepare a 3-year mitigation plan to regulate tree growth-related infrastructure problems and tree long term sustainability and aesthetics. Prepare a Master map spreadsheet to include location, tree description, photograph each tree and mark mitigation to be taken. Prepare projected estimated costs of removal/replacement, root barrier installation and removal/replacement spreadsheet for DERM tree removal application.

Methodology
I performed a visual inspection of CDD's ornamental trees in Phases 1 and 2. Trees reviewed were Green buttonwood, Gumbo limbo, Live oak, Mahogany and miscellaneous homeowner installed swale trees. Each tree species root and canopy characteristics and future mature growth were compared to the tree's planting site and infrastructure restrictions.

Observations
Green buttonwood – Phase 1
Presently there are 11 buttonwoods in swale areas that require root management to prevent root spreading under the sidewalks. In order to eliminate this problem, roots need to be pruned along edge of sidewalk and a 13'-15' long root barrier installed to redirect the new roots away from the sidewalk. All root pruning to follow ANSI A300 tree root management (Part 8) guidelines for selective root pruning. Buttonwood root barriers can wait until year 2 of this action plan since Gumbo limbo, live oak and miscellaneous trees require year 1 attention.

Canopy pruning - Green buttonwood

Following ANSI A 300 guidelines for maintaining height 25'-30' and width 17'-20'; removal of codominant branches and branches lower than 13'. All cuts to be reduction cuts at lateral branches. Future pruning to be done in 3rd year of this action plan.

Gumbo limbo root and canopy overview

Phase 1 has 22 Gumbo limbo that require a root barrier along sidewalks. Gumbo limbos have a shallow, lateral root system and require a planting strip of a minimum width of 6'. These trees have a potential canopy spread of 30'-50' that would exceed the root planting space. Thus, structural pruning is required to maintain a narrower canopy (15'-20'). Additionally, mulch rings should be expanded to the drip line of canopy for tree's health due to space limitations and compacted soil. With respect to surface roots beyond the dripline, consideration should be given to adding soil and sodding to enhance safety and aesthetics. Root barriers for the Gumbo limbo should have initial year priority, canopy pruning can be delayed until year 2 or 3 of the action plan.

Live Oak - Root and canopy overview

Phase 1 has 15 Live Oaks in townhome and open green area swales. Mature oaks can grow to 60'-80' tall and 80'-100' wide. They have wide, spreading, shallow lateral roots. Typically roots radiate 1.5 to 3 times the canopy width with large structural root near the trunk**.** Excessive surface rooting will develop in the compacted fill soil. Live Oaks have a moderate growth rate, however over time will outgrow their existing planting space damaging the sidewalks and curbs. Due to the moderate growth rate, I am not recommending they be removed but structurally pruned to open canopy, develop a central leader and remove codominant limbs. Surface roots can be covered with granular soil and planted with shade tolerant ground covers to cover roots. Root barriers of these trees should be in the initial year of action plan along the sidewalks/curb and canopy pruning in year 2.

Consideration should be given to future rerouting sidewalks around those trees in the green space areas to provide adequate root area for more expansive canopies.

Live Oak Canopy pruning for Phase 2

Structural pruning in a young tree is extremely important in Live oaks to slow their growth rate. These oaks do not have adequate planting space to reach more than 25'-35' in height and 30'+/- width. Pruning is recommended in year 4 since recently trimmed and have a defined central leader. Proper pruning of trees should follow ANSI A 300 guidelines and be performed by a skilled arborist. Shaping the canopy like a shrub is improper pruning and is consider "hat racking". Refer to Preventative Pruning Program attached.

Mahogany and other miscellaneous trees

Phase 1 has 6 Mahogany, 1 Poinciana, 1 Hong Kong orchid. The Mahogany trees have inadequate root space since they are located in narrow swales. Poinciana and orchid are inappropriate for street trees. Poinciana develops massive surface roots and orchid are extremely messy. All of these trees need immediate removal and replacing them with smaller suitable native trees.

Root pruning guidelines for root barrier installation

Root pruning under ANSI A 300, part 8 -2013 guidelines include the following:

80.3.1… Root management specifications should **be written and administered by an arborist with related training and experience.**

80.3.1.1… Root management shall be implemented by a qualified professional, familiar with the practices and hazards associated with root management and the equipment used in such operations.

80.4.5… Location of utilities … shall be taken into consideration prior to root management operations.

80.4.6… Job briefings shall be performed prior to work.

83.2.4… Equipment, tools, and work practices that damage living tissue, bark or soil beyond the scope of work shall be avoided.
84.2.2… When mitigation or avoiding infrastructure damage, only roots causing or likely to cause damage should be pruned.
84.2.6… Root pruning and cutting tools should be sharp.
(Root pruning in the above sites should be done by hand not machinery) – DW note.
84.3.2… Roots should be exposed using the least injurious excavation method prior to pruning.
84.3.5… The final cut should result in a flat surface with adjacent bark firmly attached.
84.5… Non- selective root cutting
84.5.1… roots shall be cut as far from the trunk as practical.
84.5.2… location and depth of excavation for root cutting shall be specified.
(For buttonwood, depth of excavation … 13". For all others, depth of excavation… 20") – DW note.
84.5.5… Mitigation of post root pruning shall be soil moisture management and mulching
54.5.6… Roots should be cut with equipment that minimizes cracking the wood and tearing the bark.
85.7… Root barrier should be installed as far from tree trunk as possible.

I want to emphasize the importance of including these points in the Request for Proposal and contract specifications with the potential bidders.

Root barriers
Root barriers are used to control the growth of tree roots to prevent damage, in this case to sidewalks. The barrier redirects the roots downward or sideways away from the structure being protected. By blocking the root's path, the barrier forces the roots to grow deeper, reducing the likelihood of surface rooting that causes structural damage. Installation requires trenching to a depth of 13" – 20" inches, pruning and removing targeted roots of the tree. Barrier is placed in the trench at finished grade level and backfilled. Trench should be cut at least 2" from sidewalk to allow for future root swell. A 12" barrier is suitable for the buttonwoods, and 19" barrier for Gumbo limbo and Live Oaks that have larger aggressive roots.

A Certified Arborist should be involved with the root pruning and barrier installation process to ensure both are done to specifications for affective results. Root pruning is to be done by manually trenching and cutting roots with sharp cuts as far from the trunk as possible. Root pruning is not done with stump grinder or trencher since these shred roots which allows decay and pathogens to damage the tree.

I recommend Biobarrier, a root barrier that has a 15-year manufacture warranty (when installed correctly) and has been successfully used with the above species of trees. Biobarrier is a flexible geofabric that allows water and air to pass through the barrier material and has an embedded herbicide that prohibits root growth through the fabric. See Exhibits for locations of sidewalks and barrier installation guide.

3-year Action Plan:

- Year 1 – Phase 1 - Tree removals and replacements; root barrier installation for Gumbo limbo and Live Oak
- Year 2 – Phase 1 - Root barrier installation for Green buttonwood; structural pruning of larger Gumbo limbos and Live oaks. Smaller trees will not need to be trimmed in the first 3 years.
- Year 3 – Phase 1 - Structural pruning for the Green buttonwood.
  Phase 2 – Live oak - nothing in first 3 years, structural pruning in year 4.

Exhibits:
Tree root mitigation spread sheet
Images of Phase 1 trees to mitigate
Publication ENH 1062 – Developing a Preventive Pruning Program for Young Trees – Univ. Fla.
Biobarrier Root Control - General installation guideline and estimate cost of root pruning and installation
DERM tree replacement spreadsheet
Project Estimates of Costs

If you have any questions about this report, please let me know and will be happy to discuss them with you.

David Waddell, ISA Certified Arborist

Summerville CDD

Cost Estimation of Tree Removal/Replacement and Root Barrier Installation

Estimated cost to remove and replace 10 swale trees:

Removal to include tree and surface root removal, disposal, stump grinding: $3,100.

Tree replacement with native, grade #1, 12' height, 2" caliper, soil and mulch to finish: $800 per tree.

Root barrier installation:

Root barrier installation for 48 trees in Phase 1:

Installation includes trenching 720 feet of root barrier, and trench soil replacement.

Barrier length 15ft. and barrier depth:

- 165 ft. 12" barrier for Green buttonwood trees … per tree cost = $269 x 11 trees = $2,960
- 555 ft. of 19" barrier for Gumbo limbo and Live oak… per tree cost = $300 x 37 trees = $11,100

Barrier product – Biobarrier Root Control

The manufacture warranty is 15 year for this product when installed correctly.

See product specifications and installation instructions attached.

Summerville CDD cost estimates.

Summerville CDD
Phase 1

Tree Root Mitigation

Site issue:	Mitigation	Status	Comments
A. Inadequate space	D. Remove/replace	Critical	A. Prune for central leader
B. Large surface roots	E. Sidewalk Root barrier	Preventative	B. Control height and width
C. Future infrastructure damage	F. Structural pruning		

Image unit #	Address	Common name	Scientific name	Site issue	# of Trees	Height	Mitigation	Status	Native tree	Canopy pruning - ANSI A 300
1	11581 SW 244 ST	Green buttonwood	Conocarpus erectus	B C	1	15'-17'	E F	Preventative	yes	A B
2	11601 SW 244 ST	Green buttonwood	Conocarpus erectus	B C	1	15'-17'	E F	Preventative	yes	A B
3	11617 SW 244 T	Green buttonwood	Conocarpus erectus	B C	1	15'-17'	E F	Preventative	yes	A B
4	11633 SW 244 ST	Green buttonwood	Conocarpus erectus	B C	1	15'-17'	E F	Preventative	yes	A B
5	11649 SW 244 ST	Green buttonwood	Conocarpus erectus	B C	1	15'-17'	E F	Preventative	yes	A B
6	11665 SW 244 ST	Green buttonwood	Conocarpus erectus	B C	1	15'-17'	E F	Preventative	yes	A B
7	11681 SW 244 ST	Green buttonwood	Conocarpus erectus	B C	1	15'-17'	E F	Preventative	yes	A B
8	11679 SW 244 ST	Green buttonwood	Conocarpus erectus	B C	1	15'-17'	E F	Preventative	yes	A B
9	11650 SW 244 ST	Green buttonwood	Conocarpus erectus	B C	1	15'-17'	E F	Preventative	yes	A B
10	11618 SW 244 ST	Green buttonwood	Conocarpus erectus	B C	1	15'-17'	E F	Preventative	yes	A B
11	11603 SW 244 ST	Green buttonwood	Conocarpus erectus	B C	1	15'-17'	E F	Preventative	yes	A B
12	24424 SW 115 CT	Gumbo limbo	Bursera simaruba	B C	1	12'-13'	E F	Preventative	yes	A B
13	24425 SW 115 CT	Live Oak	Quercus virginiana	B C	1	17'-19'	E F	Preventative	yes	A B
14	24424 SW 115 CT	Gumbo limbo	Bursera simaruba	B C	1	12'-13'	E F	Preventative	yes	A B
15	24434 SW 115 CT	Gumbo limbo	Bursera simaruba	B C	2	12'-13'	E F	Preventative	yes	A B
16	24474 SW 115 CT	Gumbo limbo	Bursera simaruba	B C	1	12'-13'	E F	Preventative	yes	A B
17	24484 SW 115 CT	Poinciana	Peltophorum Pterocarpum	A B C	1	12'-13'	D	Critical	no	shallow surface roots susceptible to be blown over
18	24514 SW 115 CT	Gumbo limbo	Bursera simaruba	B C	1	12'-13'	E F	Preventative	yes	A B
19	24524 SW 115 CT	Gumbo limbo	Bursera simaruba	B C	1	12'-13'	E F	Preventative	yes	A B
20	24534 SW 115 CT	Gumbo limbo	Bursera simaruba	B C	1	12'-13'	E F	Preventative	yes	A B
21	24544 SW 115 CT	Gumbo limbo	Bursera simaruba	B C	1	12'-13'	E F	Preventative	yes	A B
22	24554 SW 115 CT	Gumbo limbo	Bursera simaruba	B C	1	12'-13'	E F	Preventative	yes	A B
23	245604 SW 115 CT	Gumbo limbo	Bursera simaruba	B C	1	12'-13'	E F	Preventative	yes	A B
24	245614 SW 115 CT	Gumbo limbo	Bursera simaruba	B C	1	12'-13'	E F	Preventative	yes	A B
25	24624 SW 115 CT	Mahogany	Swietenia mahagoni	A B C	2	12'-15'	D	Critical	yes	long term infastructure damage
26	24634 SW 115 CT	Mahogany	Swietenia mahagoni	A B C	1	13'	D	Critical	yes	long term infastructure damage
27	24663 SW 115 CT	Gumbo limbo	Bursera simaruba	A B C	1	12'-13'	D	Critical	yes	insufficient root space
28	24653 SW 115 CT	Gumbo limbo	Bursera simaruba	A B C	1	12'-13'	D	Critical	yes	insufficient root space
29	24643 SW 115 CT	Gumbo limbo	Bursera simaruba	B C	1	12'-13'	E F	Preventative	yes	A B
30	24633 SW 115 CT	Mahogany	Swietenia mahagoni	A B C	1	14'15'	D	Critical	yes	long term infastructure damage

Summerville CDD
Phase 1

Tree Root Mitigation

Site issue:	Mitigation	Status	Comments
A. Inadequate space	D. Remove/replace	Critical	A. Prune for central leader
B. Large surface roots	E. Sidewalk Root barrier	Preventative	B. Control height and width
C. Future infrastructure damage	F. Structural pruning		

Image unit #	Address	Common name	Scientific name	Site issue	# of Trees	Height	Mitigation	Status	Native tree	Canopy pruning - ANSI A 300
31	24623 SW 115 CT	Mahogany	Swietenia mahagoni	A B C	2	13'15'	D	Critical	yes	long term infastructure damage
32	24613 SW 115 CT	Gumbo limbo	Bursera simaruba	B C	1	12'-13'	E F	Preventative	yes	AB
33	24603 SW 115 CT	Gumbo limbo	Bursera simaruba	B C	1	12'-13'	E F	Preventative	yes	A B
34	24553 SW 115 CT	Gumbo limbo	Bursera simaruba	B C	1	12'-13'	E F	Preventative	yes	A B
35	24543 SW 115 CT	H K Orchid	Bauhinia blakeana	A B C	1	12'-13'	D	Critical	no	A B
36	24553 SW 115 CT	Gumbo limbo	Bursera simaruba	B C	1	12'-13'	E F	Preventative	yes	A B
37	24523 SW 115 Ct	Gumbo limbo	Bursera simaruba	B C	1	12'-13'	E F	Preventative	yes	A B
38	24443 SW 115 CT	Live Oak	Quercus virginiana	B C	1	15'-17'	E F	Preventative	yes	A B
										raise grade w/ soil + ground cover
39	24433 SW 115 CT	Live Oak	Quercus virginiana	B C	1	15'-17'	E F	Preventative	yes	remove homeowner mulch/stone
										A B
40	24323 SW 115 CT	Gumbo limbo	Bursera simaruba	B C	1	12'-13'	E F	Preventative	yes	A B
41	24313 SW 115 CT	Gumbo limbo	Bursera simaruba	B C	1	12'-13'	E F	Preventative	yes	A B
42	24303 SW 115 CT	Gumbo limbo	Quercus virginiana	B C	1	12'-13'	E F	Preventative	yes	A B
43	24314 SW 115 CT	Gumbo limbo	Quercus virginiana	B C	1	12'-13'	E F	Preventative	yes	A B
44	24653 SW 115 CT	Live Oak	Quercus virginiana	B C	1	19'-20'	E F	Preventative	yes	AB island - adjacent to house number
45	24643 SW 115 CT	Live Oak	Quercus virginiana	B C	1	19'-20'	E F	Preventative	yes	AB island - adjacent to house number
46	24623 SW 115 CT	Live Oak	Quercus virginiana	B C	1	19'-20'	E F	Preventative	yes	AB island - adjacent to house number
47	24623 SW 115 CT	Live Oak	Quercus virginiana	B C	1	19'-20'	E F	Preventative	yes	AB island - adjacent to house number
48	24624 SW 115 CT	Live Oak	Quercus virginiana	B C	1	19'-20'	E F	Preventative	yes	AB island - adjacent to house number
49	24644 SW 115 CT	Live Oak	Quercus virginiana	B C	1	19'-20'	E F	Preventative	yes	AB island - adjacent to house number
50	24664 SW 115 CT	Live Oak	Quercus virginiana	B C	1	19'-20'	E F	Preventative	yes	AB island - adjacent to house number
51	11453 SW 244 LANE	Live Oak	Quercus virginiana	B C	1	19'-20'	E F	Preventative	yes	AB island - adjacent to house number
52	11453 SW 244 LANE	Live Oak	Quercus virginiana	B C	1	19'-20'	E F	Preventative	yes	AB island - adjacent to house number
53	MAIL BOX 244 TER	Live Oak	Quercus virginiana	B C	1	19'-20'	E F	Preventative	yes	AB island - adjacent to house number
54	11492 SW 244 TER	Live Oak	Quercus virginiana	B C	1	20'-22'	E F	Preventative	yes	AB island - adjacent to house number
										raise grade w/ soil + ground cover
55	11492 SW 244 TER	Live Oak	Quercus virginiana	B C	1	20'-22'	E F	Preventative	yes	AB island - adjacent to house number
							E F	Preventative		raise grade w/ soil + ground cover
	TOTAL				**58**					

Planting space inadequate for maturing surface roots: surface roots will cause sidewalk damage and trip and fall hazards and underground utility issues
Large surface roots: Structural and secondary roots will be exposed and will create trip and fall hazards and prevent under cover shrubs and grass
Future infrastructure damage: As tree matures roots extends out to the canopy dripline and beyond, this is called the Critical Root Zone. Roots absorb water and store carbohydrates generated by the leaves, thus roots expand in diameter as well as length. Structural roots also anchor the trunk and canopy and thus spread in relation to the canopy spread.

Remove and replace: This tree will in near future become so problematic that it will have to be removed and replaced with another suitable tree. This is due to inadequate planting space for the variety of tree. Tree replacement will have to meet Miami-Dade County replacement criteria and is determined by the canopy to replace, which in turn is determined by the diameter of the tree trunk measured at 4.5 ft. above ground level. This is termed Diameter at Breast Height (DBH). Removal costs and replacement cost will increase as the trees mature.
Root barrier: With respect to Live Oak trees they mature slower than the Mahogany and Gumbo limbo trees. This slower growth rate can be controlled by structural pruning to reduce canopy size and tree roots can be redirected away from sidewalks/driveways with the installation of root barriers.

Structural pruning: Structural pruning is trimming canopy and roots following guidelines set by the American National Standards Institute (ANSI A 300). Trimming in Miami Dade Cty. follows these standards. Canopy shaping is not an ANSI A 300 guideline and is considered "hat racking".

Status: Critical - For purposes of the 3 year arborist plan, this is the most important issue to resolve for personal/property liability and costs.
Preventitive - Tree roots and canopy can be controlled by restricting their growth due in part by trees' slower growth rate and use of root barriers and early and proper canopy pruning.

Summerville CDD

Tree Removal Mitigation

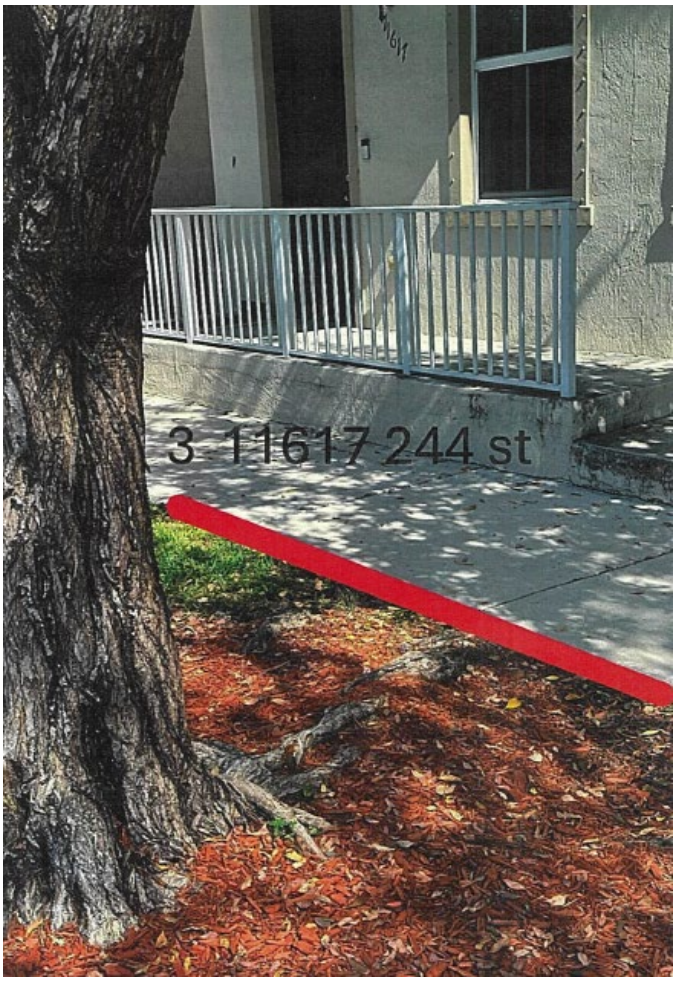
Image unit #	Address	Common name	Scientific name	DBH inches	Height	Width	Native tree	Mitigation sq. ft	Notes	Radius	Area
17	24484 SW 115 CT	Poinciana	Peltophorum Pterocarpum	11	12-13'	12'	no	95	to be replaced with Native Tree	5.50	95
25	24624 SW 115 CT	Mahogany	Swietenia mahagoni	8	12-13'	12'	yes	50	to be replaced with Native Tree	4.00	50
25	24624 SW 115 CT	Mahogany	Swietenia mahagoni	10	15'	13'	yes	79	to be replaced with Native Tree	5.00	79
26	24634 SW 115 CT	Mahogany	Swietenia mahagoni	8.5	13'	11'	yes	57	to be replaced with Native Tree	4.25	57
27	24663 SW 115 CT	Gumbo limbo	Bursera simaruba	8	12-13'	10'	yes	50	to be replaced with Native Tree	4.00	50
28	24653 SW 115 CT	Gumbo limbo	Bursera simaruba	8	12-13'	10'	yes	50	to be replaced with Native Tree	4.00	50
30	24633 SW 115 CT	Mahogany	Swietenia mahagoni	9.5	14-15'	13'	yes	71	to be replaced with Native Tree	4.75	71
31	24623 SW 115 CT	Mahogany	Swietenia mahagoni	9	13-14'	12'	yes	64	to be replaced with Native Tree	4.50	64
31	24624 SW 115 CT	Mahogany	Swietenia mahagoni	10	15'	15'	yes	79	to be replaced with Native Tree	5.00	79
35	24543 SW 115 CT	H K Orchid	Bauhinia blakeana	9	12-13'	12'	no	64	to be replaced with Native Tree	4.50	64
	TOTAL							**657**			

summerville removal mitigation sp a

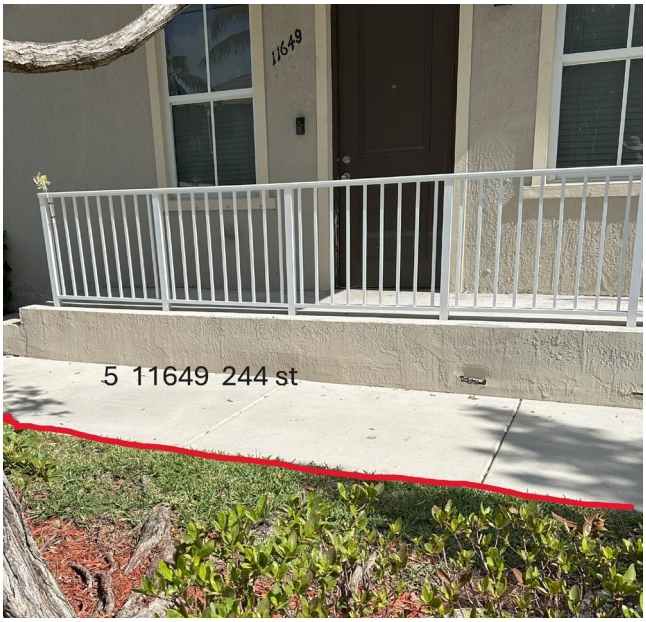

SUMMERVILLE CDD
PHASE 1
UNIT 43
UNITS 40-42
UNITS 1-8
UNITS 12-15
54-55
UNITS 9-11
UNITS 38-39
UNITS 16-18
UNITS 51-53
UNITS 19-24
UNITS 32-37
UNITS 25-26
UNITS 27-31
UNITS 44-50
SW 247 St
Google Earth
Image Landsat / Copernicus


1 11581 244 st


2 - 11601 244 st


3 11617 244 st


4 11633 244 st


11649
5 11649 244 st


11665
6 11665 244 st


11681
7 11681 244 st


8 11679 244 st


8b 11679 244st


11650
9 11650 244 st


11618
10 11618 244 st


11602
11 11602 244 st


12 24424 115 ct


13 24424 115 ct


14 24424
115 ct

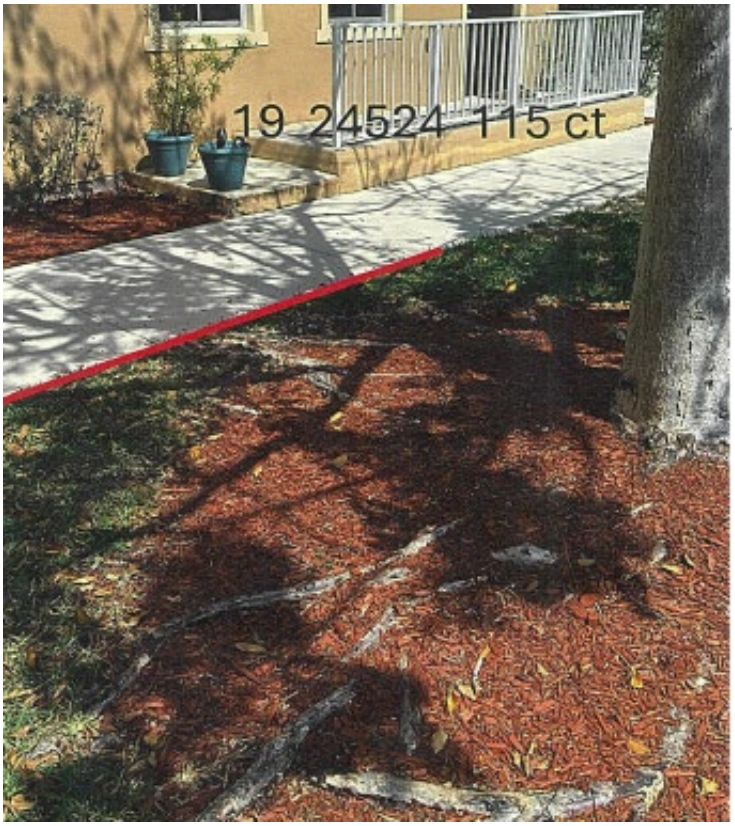

15 a 24434 115 ct


15b 24434 115 ct


16 24474 115 ct


17 24484 115 ct
REMOVAL


2451 4
18 24514 115 ct


19 24524 115 ct


20 24534 1156 ct


21 24524 115 ct

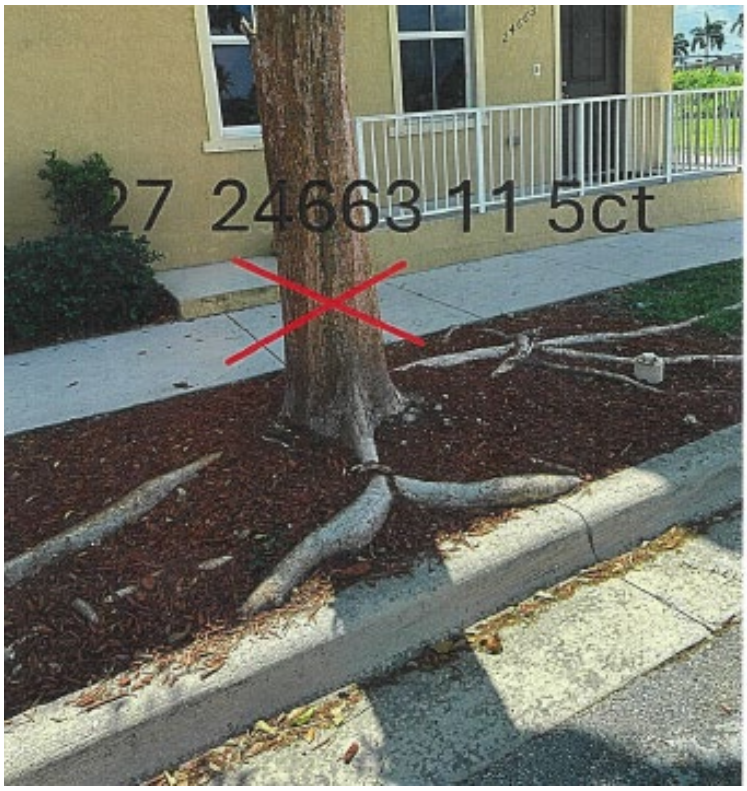

22 24554 115 ct


23 24604 115 ct


24 24614 115 ct


25 24624 115 ct


26 24634 115 CT


27 24663 11 5ct


24653
28 24653 115 ct


29 24643 115 ct


30 24633 115 ct
removal


31 24623 115 ct
REMOVAL


31b 24623 115 ctl


32 24613 115 ct


33 24603 115 ct


34 24553 115 ct


35 24543 115 ct


36 24533 115ct


37 24523 115 ct


pruning cuts
38 24443 115 ct

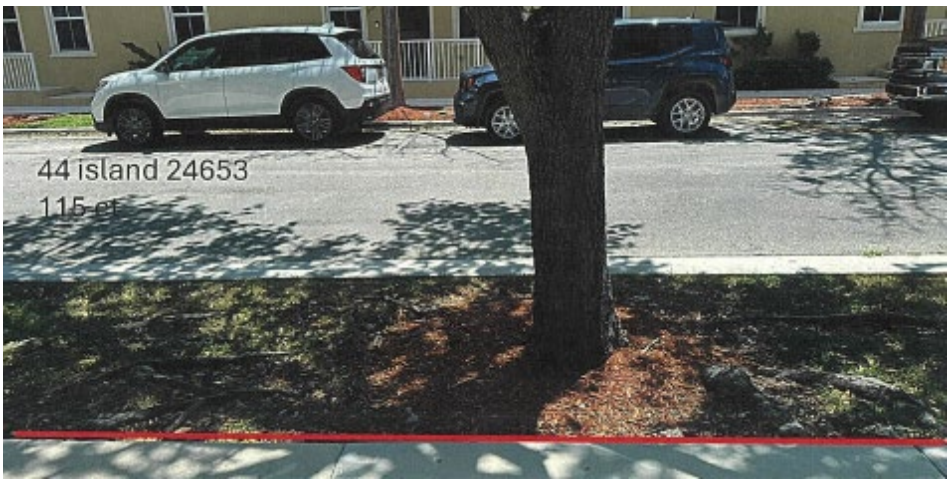

39 24433 115 ct
remove
mulch/stone


40 24323 115 ct


41 24313 115ct


42 24303 115 ct


43 24314 115 ct


44 island 24653
115 ct


45 24643 115
ct island


46 24623
115 ct islandt


47 24623 115 ct island


48 24624 island
t


49 24644 115 ct
island


50 island


51 11483 244 lane


52 11483 244 ln


53 mail boxes 244 ter


54 green belt 11492 244 ter

CHAPTER 12

DEVELOPING A PREVENTIVE PRUNING PROGRAM: YOUNG TREES

PUBLICATION N°
ENH 1062

EDWARD F. GILMAN
AMANDA BISSON

UF UNIVERSITY of FLORIDA
IFAS Extension

Introduction

Trees growing in urban and suburban landscapes offer many benefits to the community. However, when a tree or part of a tree breaks, it can cause extensive damage to people and or property (Figure 1). A preventive pruning program is an important tool to minimize the risks of tree defects. The most common defects are codominant stems and aggressive low branches that either split from the tree or result in large pruning cuts upon removal (Figure 2). Problems such as these result in tree stress, reduce the life span of the tree, and place people and property at risk. Preventive pruning helps to promote good structure, making trees more resistant to storms and other natural forces. A research study in 2006 suggests that pruning trees significantly reduces trunk movement and damage when exposed to 120-mph winds.

Trees with good structure are characterized by a single dominant leader, strong branch unions without bark inclusions and a balanced canopy (Figure 3). Preventive or structural pruning is a process that can help to promote these attributes in trees.

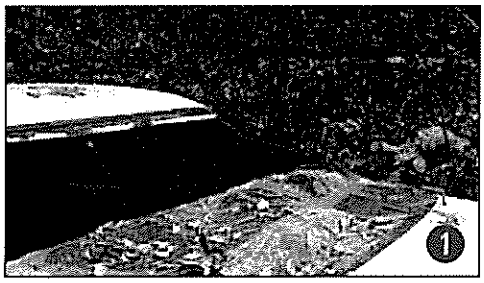


Figure 1

A large limb fell on this car and broke the windshield during a storm. Pruning may have prevented this damage.

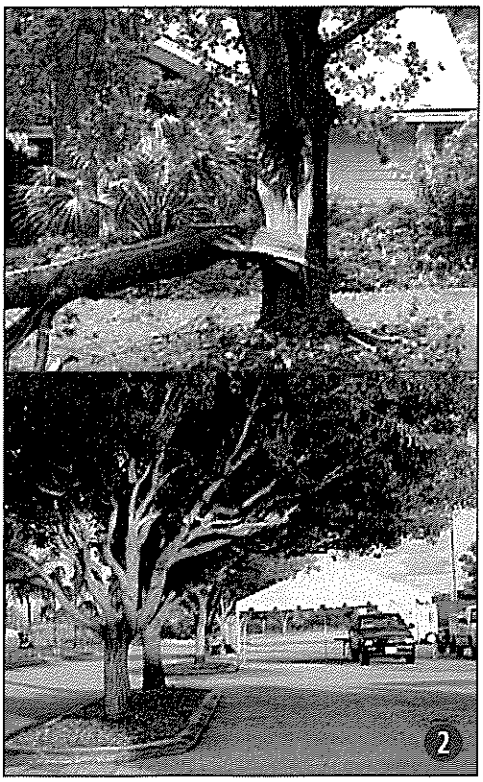
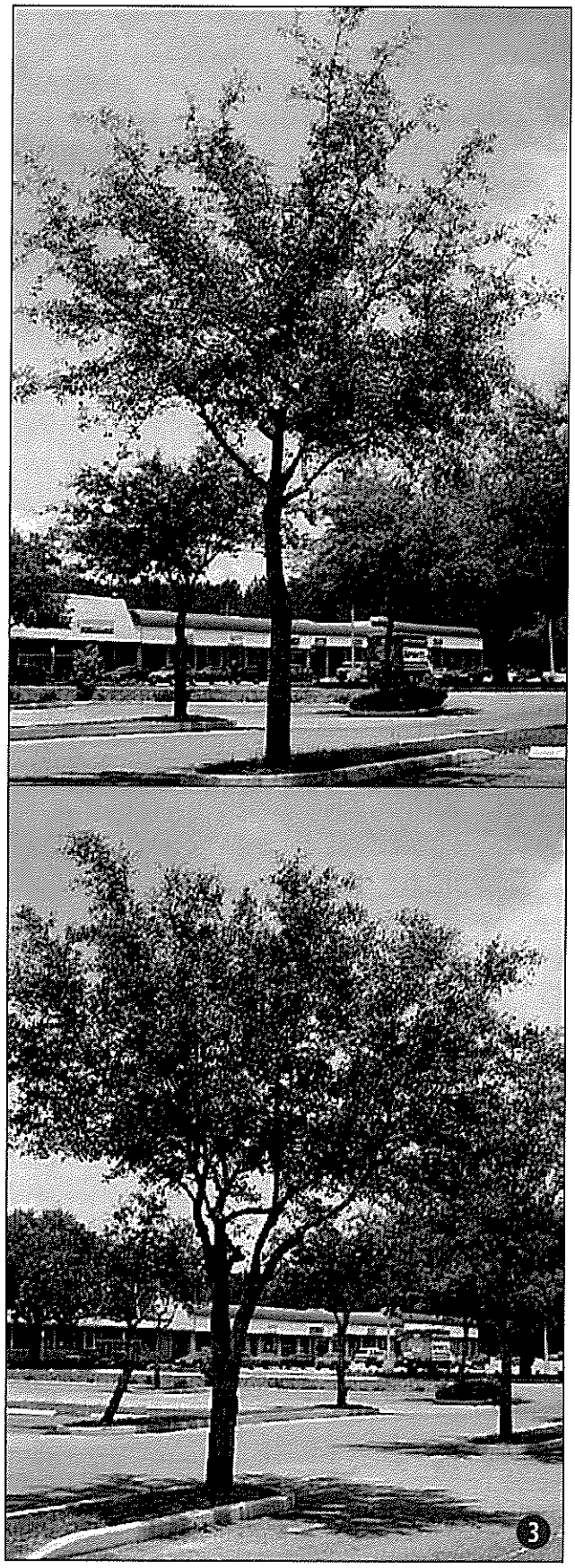


Figure 2

The codominant stem (top) split from the tree because of a weak branch connection and included bark. Proper structural pruning could have prevented this defect from failing. The large lower limbs (bottom) of these mahogany trees are too close to the ground and will have to be removed soon to provide for clearance under the canopy. Removing large branches like this can initiate decay and slows growth. Prune earlier to prevent this poor form from developing.

Figure 3

A good structure (top) is characterized by a single dominant leader, and branches that are spaced and not touching throughout the canopy. A bad structure (bottom) has many dominant stems and branches clustered together.



Determine Your Objectives

The major objective of preventive structural pruning is to direct the growth of the tree so that it forms a sustainable structure. This is accomplished by pruning stems and branches that are not growing in the correct direction or position.

Structural issues that cause trees to fail
Codominant stems
Included bark
Unbalanced canopy
Lions-tailing or over-lifting
Large lower limbs

Correction of Structural Issues

Codominant Stems and Included Bark

Codominant stems are stems of equal size originating from the same point on the tree. Included bark is bark pinched between two stems creating a weak union. Codominant stems with a 'V' shaped union are often accompanied by included bark (Figure 4). This union is weak because the bark inclusion prevents any physical connection between the two stems. Instead of overlapping wood creating a strong connection, the two stems push each other apart as they grow and a crack develops. Researchers at the University of Florida have visited several hurricane sites, and found time and time again that trees failed due to structural issues like codominant stems and bark inclusions.

Strong branch unions are 'U' shaped and have a prominent collar (Figure 5). The collar is a swelling formed by overlapping trunk and branch wood. This forms a strong union resistant to breakage.

Unbalanced Canopy

An unbalanced canopy occurs when one side of the tree canopy is much heavier than the other, or when most of the canopy weight is at the tips of branches. The later is a product of lions-tailing or over-lifting, a poor pruning practice that removes all of the live foliage along the lower and interior parts of the main branches (Figure 6). Lions-tailing is generally accepted by professionals as a poor pruning practice that makes trees more susceptible to wind damage. Lions-tailing encourages more growth at the tips of the branches, resulting in a taller and wider tree. This results in foliage exactly where it is unwanted; that is, higher off the ground. Lions-tailing is often performed as a type of thinning; however, this type of pruning routinely encourages sprouting along the main branches and the canopy quickly fills back in with foliage. These sprouts often have weak connections to the stems and break easily in storms. In addition, lions-tailed trees that are damaged in storms are difficult to restore because the branches arborists would normally cut back to have already been removed.

Large Lower Limbs

Removal of lower limbs is important in order to provide clearance for pedestrian and vehicular traffic. Too often lower limbs are removed only when they have become large and have started to droop, many years after planting. Removal of large branches can initiate decay in the trunk, especially in species prone to decay (Figure 7). Large limbs left to grow may also develop structural defects such as excessive end weight. This defect can increase the likelihood of branch failure. It is important to keep in mind that low branches on young trees are temporary and will have to be removed in the future. Manage lower branches to prevent structural defects from forming.

Figure 4

Codominant stems with included bark have weak connections and often split apart in storms (inset).

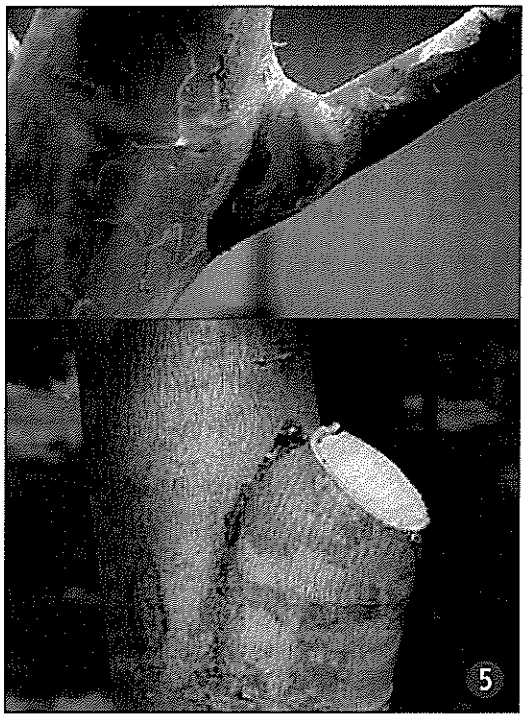


Figure 5

Strong branch connections have a 'U' shaped union (top) and a prominent branch collar. Some species also show a very distinct branch bark ridge (bottom).

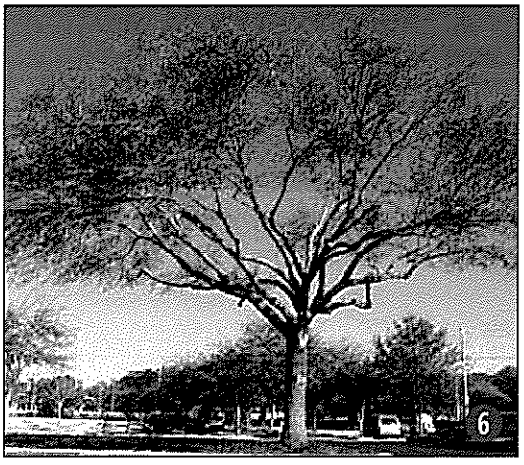


Figure 6

Lions-tailed trees have an unbalanced canopy since all of the foliage is at the tips of the branches. These trees are more susceptible to storm damage and difficult to restore once they are damaged.

Pruning to Promote Strong Structure

Developing a preventive pruning program requires that managers be familiar with the techniques of structural pruning. Structural pruning should be practiced for the first 15 to 25 years of a tree's life. This is the amount of time required to establish strong structure in the canopy and will help to make the tree more resistant to storm damage (Figure 8). In structural pruning, reduction and removal cuts are used to slow the growth of large or rapidly growing branches that compete with the leader. This encourages the one stem you chose as the leader to grow faster.

Components of Structural Pruning	
1	Develop or maintain a dominant leader
2	Identify the lowest branches in the permanent canopy
3	Prevent branches below the permanent canopy from growing too large
4	Keep all branches less than one half the trunk diameter
5	Space main branches along one dominant trunk
6	Suppress growth on branches with included bark

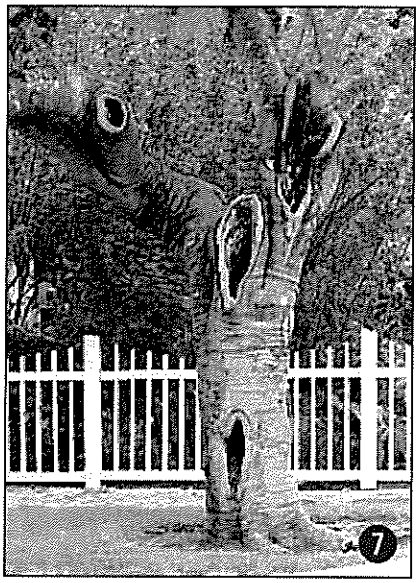


Figure 7

Large pruning cuts can initiate pockets of decay in the trunk.

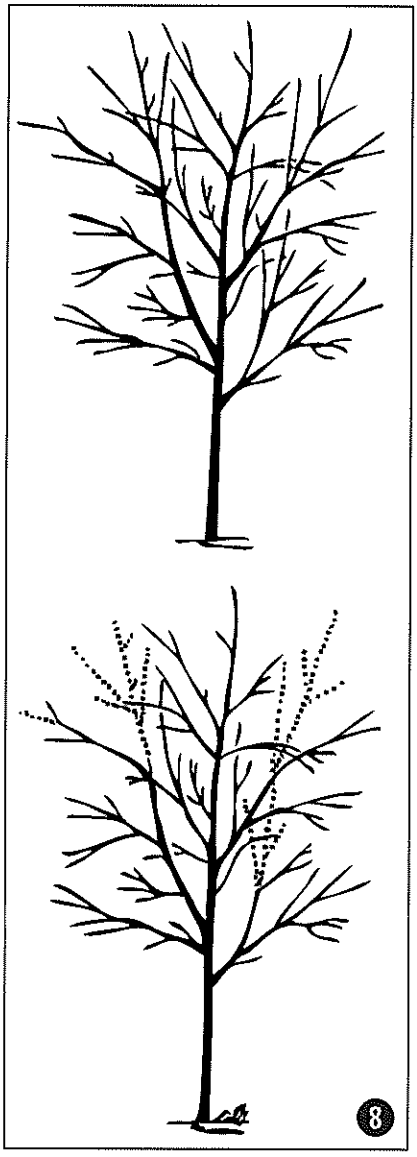


Figure 8

Pruning the stems represented by the dotted lines shortens two of the three codominant stems. This helps establish a single dominant leader in this young shade tree.

Component 1

Developing or Maintaining a Dominant Leader

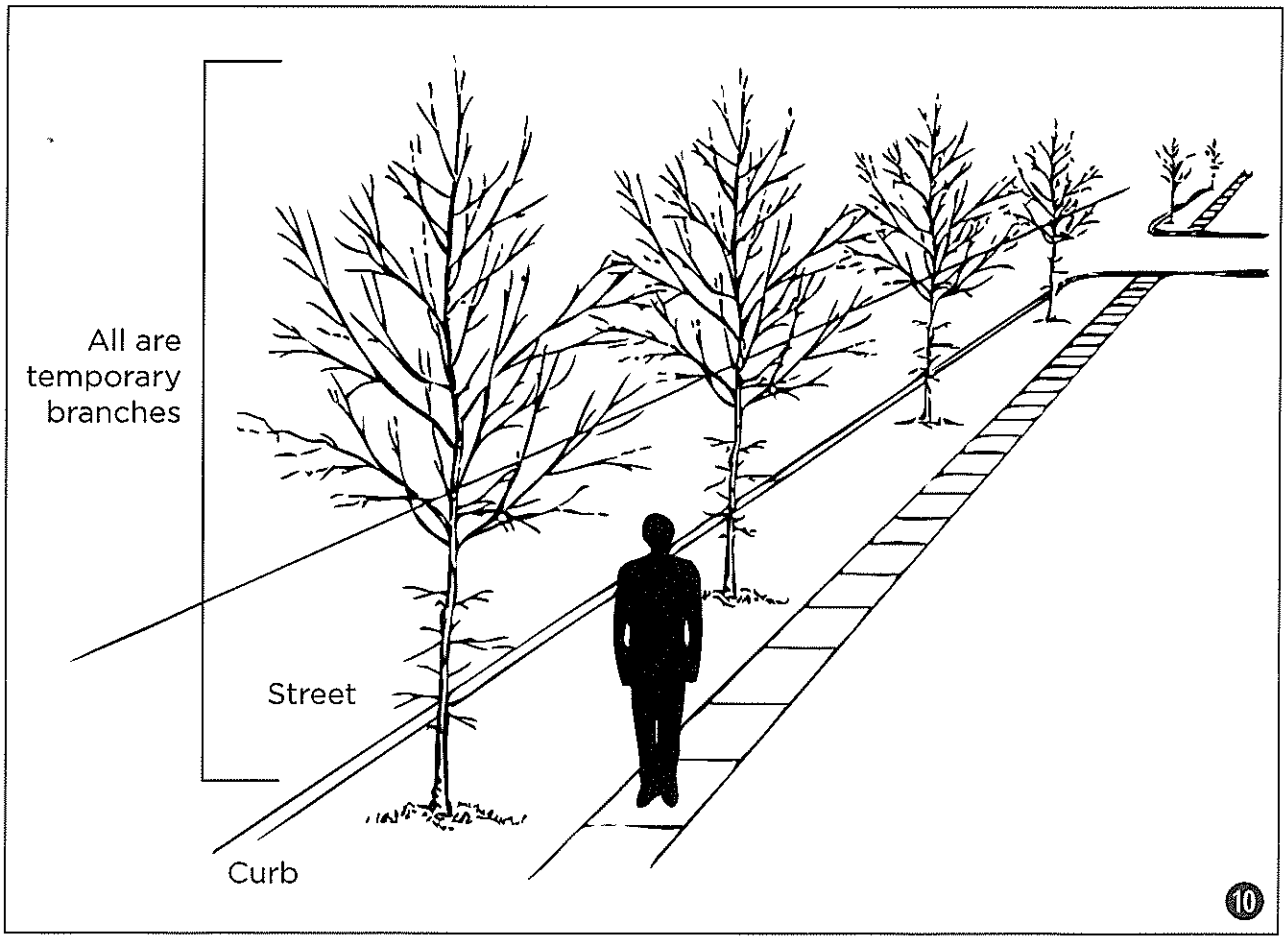
Developing a dominant leader starts by identifying the stem that will make the best leader; typically it is the largest stem. This might be easy for some trees and more difficult in others. If all stems are about the same diameter, pick the one that is closest to the center of the canopy as the leader. Then determine which stems are competing with that leader, and decide where to shorten these competing stems (Figures 8 and 9).

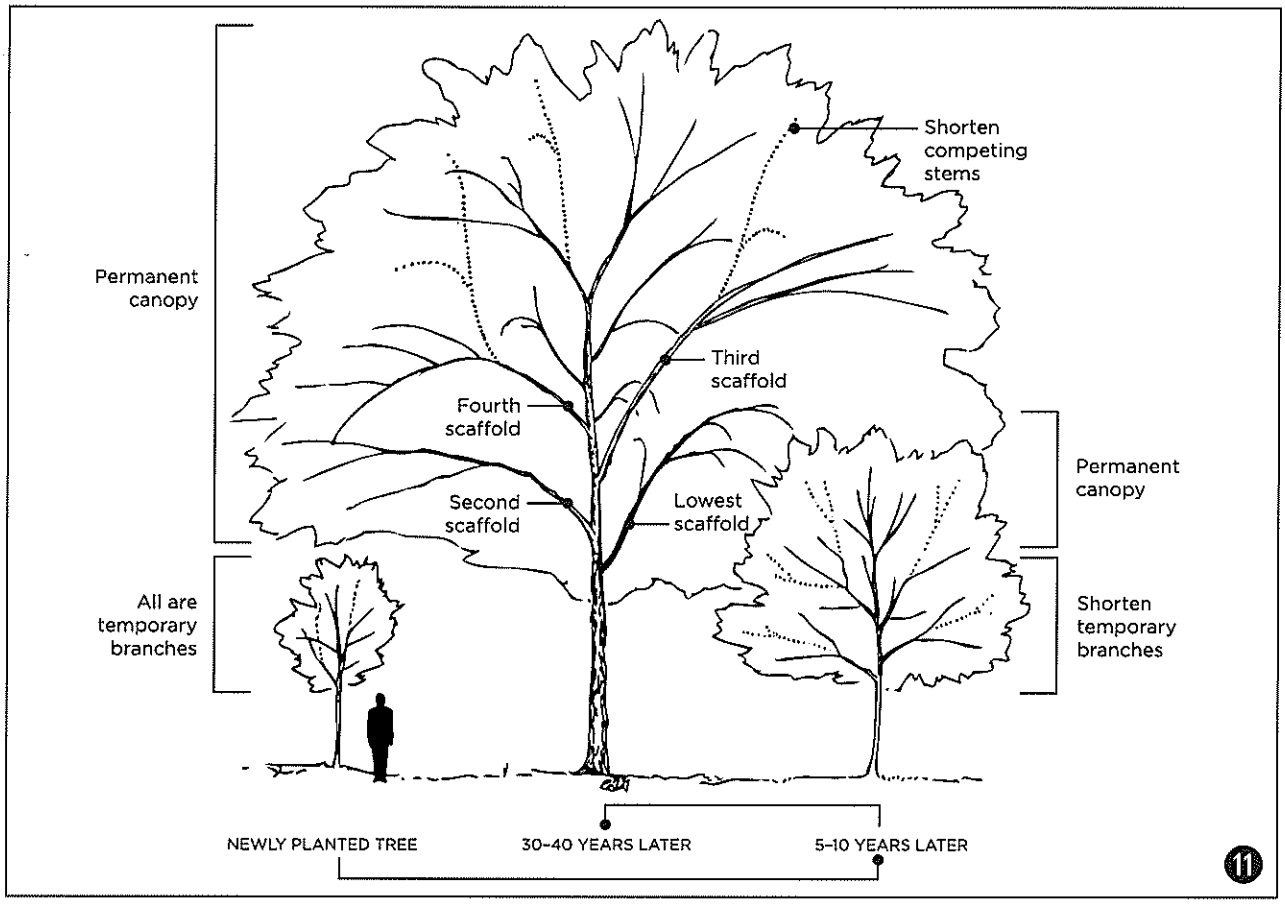
Figure 9

Before and after structurally pruning a young live oak. Notice the arrow indicating where the stem on left side of the leader has been reduced.

Figure 10

All existing branches on these recently planted trees along a street will eventually have to be removed in order to provide clearance for buses, garbage trucks, and tractor trailers.





Component 2

Identifying the Lowest Branches in the Permanent Canopy

First, recognize that branches do not change their position on the trunk as the tree grows. In fact, it may be surprising for some to realize that all branches on trees with less than about 4" caliper will eventually be removed. Identifying the lowest branches in the permanent canopy will facilitate management of lower temporary branches (Figures 10 and 11).

Component 3

Prevent Branches below the Permanent Canopy from Growing Too Large

The lowest permanent branch on many shade trees should be at least 15 to 20 feet off the ground; all lower branches are eventually removed under ideal management. Lower branches should be subordinated (reduced) early to prevent them from becoming too large. This prevents the tree manager from having to make large pruning wounds on the trunk. We do this with reduction cuts to slow growth on these aggressive low branches. This helps to push new growth higher up in the canopy, and will minimize the amount of large cuts that need to be made on the trunk.

Figure 11

Structural pruning cycle over a period of 40 years. Notice how all of the branches on a newly planted tree and half of the branches on a 5- to 10-year-old tree are temporary. These branches are managed with reduction cuts to slow their growth and encourage more growth in the upper canopy, which is the part of the tree that will be around for a long time. In the maturing permanent canopy (center), the large scaffold branches have been identified and spaced evenly along the trunk by shortening or removing nearby branches.

Component 4

Keep All Branches Less than Half the Trunk Diameter

Branches more than one-half the diameter of the trunk lack a branch protection zone. This zone inside the branch union is rich in chemicals that inhibit spread of organisms and decay from the pruning wound into the trunk. Keeping branches less than half the trunk diameter ensures that the branch collar and branch protection zone remain intact.

Component 5

Space Main Branches along One Dominant Trunk

Ideally, main branches (also called scaffold limbs) should be spaced along the dominant leader in two or more rotations around the trunk so that no branch is directly above another (Figure 12). Spacing scaffold limbs allows for the trunk and leader to develop properly, gives the canopy a more balanced form, and reduces wind resistance.

Component 6

Suppress Growth on Branches with Included Bark

Suppress growth on branches with included bark (Figure 13) to minimize the chance of breakage. As mentioned earlier, included bark is a structural defect that causes the union between branch and trunk to be very weak. Reduce branches with included bark to slow their growth until you are ready to remove them.

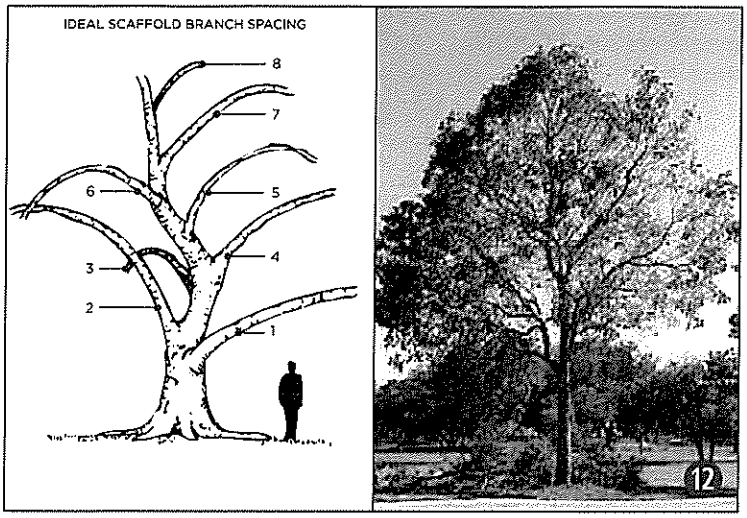


Figure 12

Major scaffold branches on this mahogany tree (right) have been spaced evenly throughout the canopy so that no branch is directly above another, making the tree more structurally sound (left).

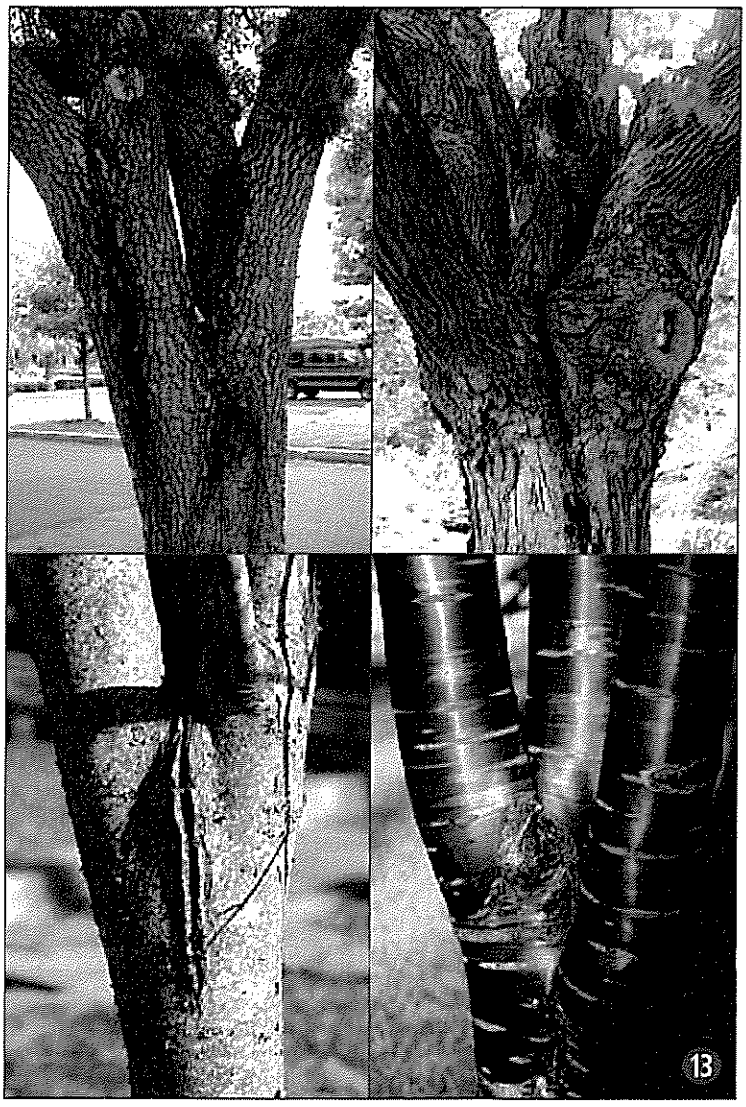


Figure 13

Variations of included bark on four different trees.

Determining Pruning Cycle and Pruning Dose

Pruning Cycle

The next step in developing a preventive pruning program is to determine the pruning cycle and pruning dose. A pruning cycle is the interval of time between each pruning event. The interval is affected by many factors. For instance, trees coming from a nursery with sound pruning practices will have a better structure to start out with than trees coming from a nursery with poor pruning practices. These low quality trees may require more pruning at a higher interval than the high quality trees.

Pruning cycles are also affected by growth rate, climate and species. In warm climates where trees grow faster, the intervals between pruning events should be shorter. Species that are prone to decay should also be pruned more often so that the need to make large cuts can be avoided. A typical pruning cycle for an active, preventive urban forestry pruning program in Florida is about three years. If the pruning cycle is too long, defects may become more severe. This results in having to make large pruning cuts, which can initiate pockets of decay in the trunk and branches. A pruning cycle of 3-5 years will require a higher pruning dose to achieve pruning objectives. Conversely, a pruning cycle of 1-2 years will require a smaller dose.

Suggested minimum pruning cycle
At planting
Year 2 or 3
Year 5 or 6
Year 8 to 10
Year 13 to 15

Pruning Dose

The pruning dose is the amount of live tissue removed from the entire tree at one pruning. More than this can be removed from any particular stem or branch. Typically, arborists estimate this by evaluating how much foliage was removed by the pruning. Customer expectations, size of stems and pruning cycle can influence the pruning dose (Table 1).

With a large pruning dose, you create large pruning wounds and a large void in the canopy, greatly encouraging growth in unpruned portions of the tree. Conversely, a small pruning dose creates smaller pruning wounds and a smaller void in the canopy, encouraging modest growth in the unpruned portions of the tree. Large pruning doses are typically employed only on young trees. Municipalities often use larger pruning doses where aesthetics is less of a concern. A smaller pruning dose along with a shorter pruning cycle is nicely suited for residential and commercial properties where aesthetics are more of a concern. Pruning dose on mature trees should be less than 10% unless there is a good reason (e.g. a major defect) to remove more.

Table 1. Uses of high and low pruning doses

LOW PRUNING DOSE (5–20% of foliage removed)	HIGH PRUNING DOSE (>20% of foliage removed)
Mature or recently planted	Young, established trees
Cooler climates with short growing seasons	Warm climates with long growing seasons
Decay-prone species (poor compartmentalizers)	Decay-resistant species (good compartmentalizers)

Good compartmentalizers of decay (i.e. trees that resist decay following pruning) are those trees such as live oaks and mahogany that resist decay following an injury such as a wound or a pruning cut. When planning a pruning dose for your tree, you might want to set the maximum diameter of pruning cut smaller for a more decay-prone species (Table 2). The limit should be set for both reduction and removal cuts (Figures 14 and 15). Ideally, limit pruning cuts to 2-3 inches on decay-prone trees and 4-6 inches on decay-resistant trees. Large trees that are capable of forming heartwood will begin forming it as branch size increases to 8 inches or more. Exposing heartwood can initiate decay in certain species of trees. Professional arborists keep records of when species begin forming heartwood. This should help them decide when low interfering branches should be removed from trees.

Table 2. Guidelines for determining maximum branch diameter to prune.

BRANCH SIZE	CONSEQUENCE OF REMOVAL	RECOMMENDED ACTION
Less than 1/3 trunk diameter	Not many	Remove if needed
1/3 to 1/2 trunk diameter	Minimal	Shorten instead of removing
More than 1/2 trunk diameter	Some decay	Shorten instead of removing
Large enough to have heartwood	Defects more likely	Shorten instead of removing

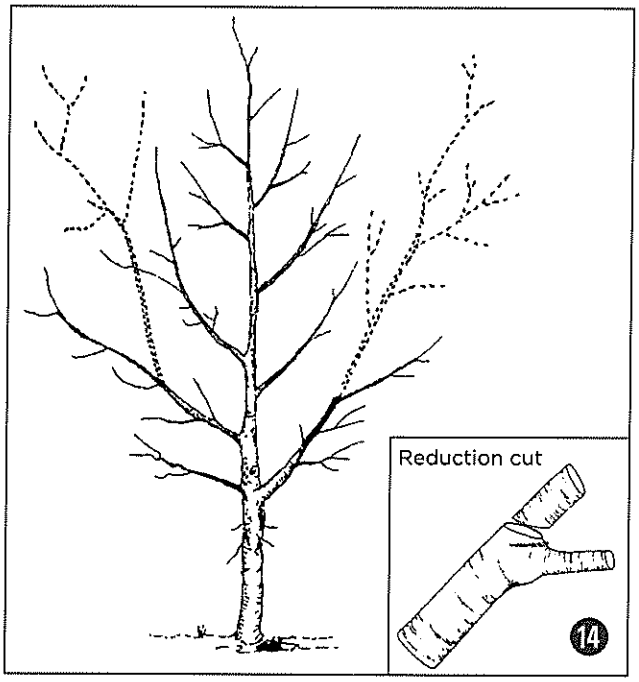
Executing the Pruning Plan

Making Proper Pruning Cuts

An important component of a good preventive pruning program is making proper pruning cuts. There are two types of pruning cuts; these are reduction cuts (Figure 14), and removal cuts (Figure 15).

A good pruning cut begins with an undercut about 12 inches from the trunk (Figure 16). A top cut is then made further out from the limb or directly above the undercut. The majority of the limb is safely removed in this step without causing any damage to the tree. (Disregarding these first two steps could cause damage to the trunk because the branch is often too heavy to hold itself up causing tissue to tear down through the collar.) The last step is to remove the remaining stub with a final cut, being careful not to cut flush against the trunk. It is very important to leave the collar intact (Figure 17). A branch collar is a swollen area at the base of the branch where it joins the trunk. The tissue is rich in energy reserves and chemicals that hinder the spread of decay. Good pruning cuts avoid cutting into the collar and typically leave a round-shaped wound, whereas flush cuts are oval-shaped (Figure 18). The branch bark ridge is where trunk bark pushes up into the union as it grows against branch bark (Figure 19). This indicates a strong union. Never cut off the branch bark ridge since this removes the branch protection zone inside the collar. The protection zone helps prevent decay organisms from entering the trunk.

Bad cuts are called flush cuts and are unacceptable in a preventive pruning program (Figure 20). Flush cuts remove the top of the branch bark ridge, and prevent the wound from sealing over properly. Flush cuts typically expose more bark on top of the cut than on the sides and bottom. These cuts typically close first on the sides then on the top and bottom. Severe decay can occur behind flush cuts, especially when they are large in diameter.



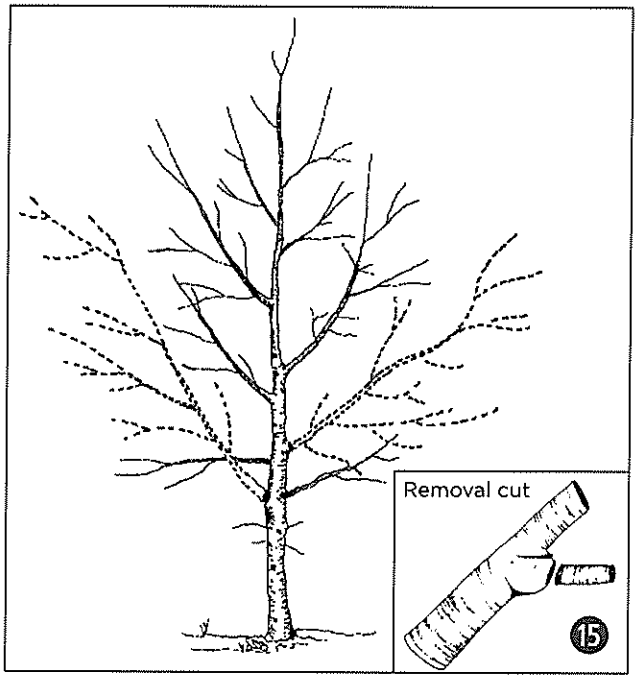


Figure 14

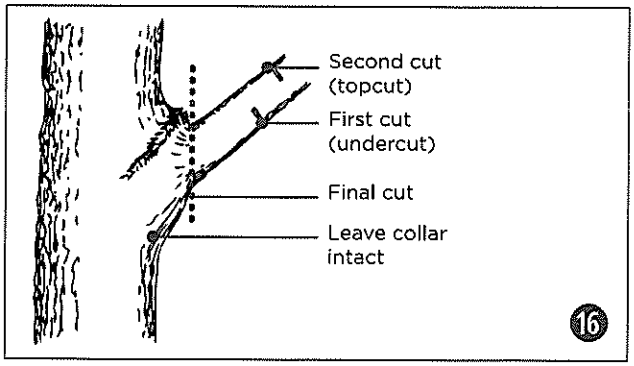
A reduction cut shortens the length of a stem by pruning back to a smaller limb large enough to assume dominance.

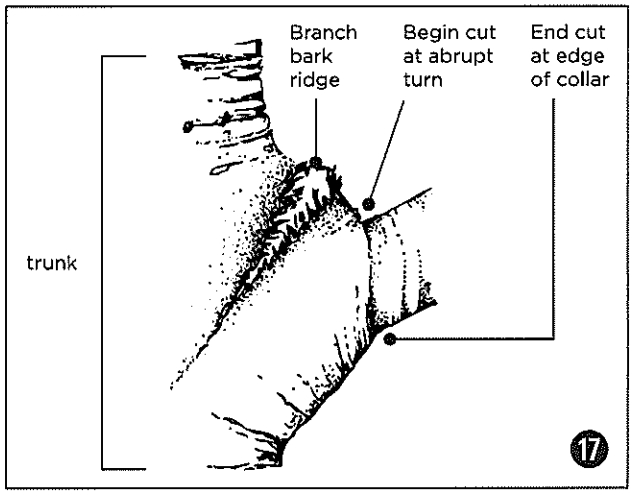
Figure 15

A removal cut prunes a branch back to the trunk or parent branch.

Figure 16

There are three steps to making a proper pruning cut that will minimize damage to the tree.





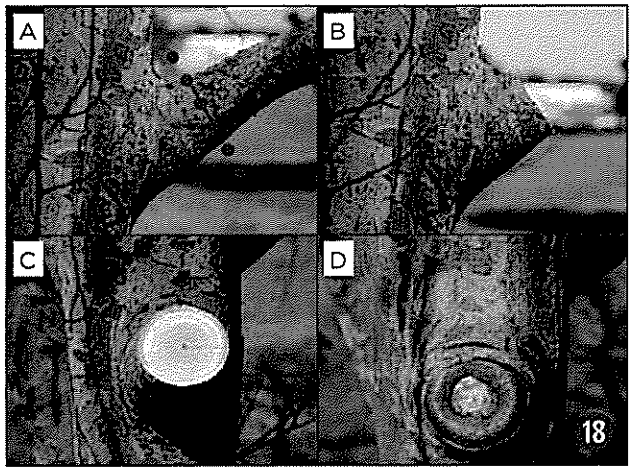


Figure 17

A close-up illustration showing where to make a removal cut.

Figure 18

A proper removal cut is made by cutting on the dotted line (A). When done correctly, a removal cut leaves the collar intact (B). The wound from a removal cut should be round in shape (C). Callus formation around a proper removal cut wound should be symmetrical (D). A good way to teach yourself and others how to properly prune is to practice making cuts to look like C and D.

Figure 19

The "yes" (dotted) line represents an appropriate removal cut. Cutting through the "no" (solid) line cuts through the collar and represents a flush cut.

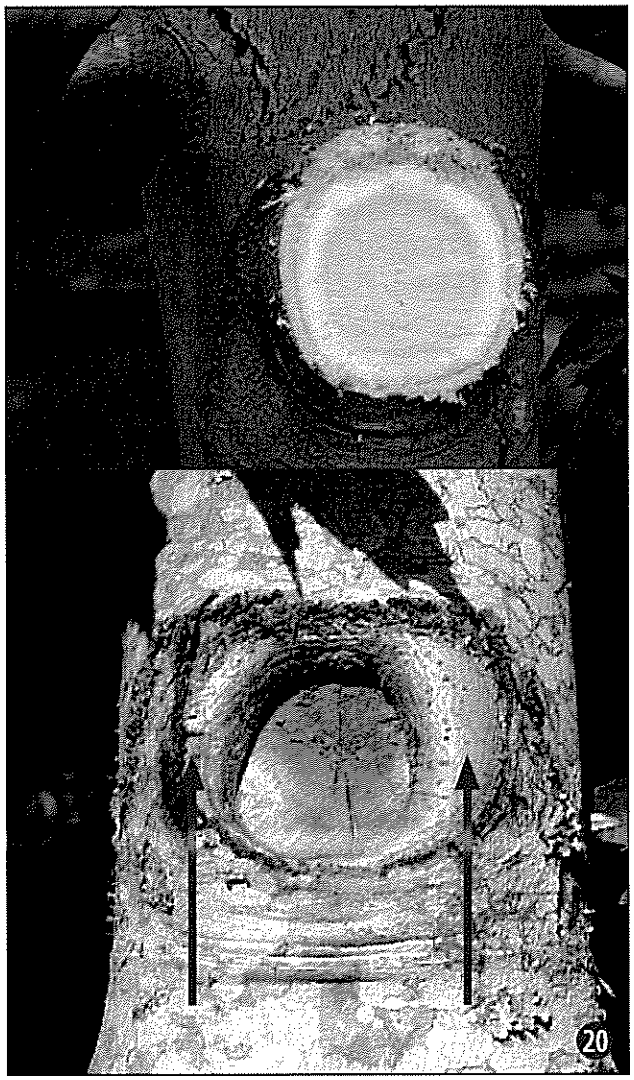


Figure 20

Flush cuts remove the top of the branch bark ridge, and typically expose more bark on top of the cut than on the sides and bottom (top). Flush cuts prevent the wound from sealing over properly, and typically close first on the sides then on the top and bottom (bottom). Severe decay can occur behind flush cuts, especially large ones.

Pruning Plans

With six to seven pruning events in the first 25 to 30 years after planting, a good structure can be developed that will place the tree on the road to becoming a permanent fixture in the landscape. Less frequent pruning may be required if good quality nursery trees were planted with a dominant leader and trees were irrigated appropriately until established. However, even well structured nursery trees will require regular pruning after planting. The following is an example pruning program for the first 30 years of a tree's life.

First Five Years after Planting

In the first five years after planting, most of the branches are temporary; however, do not remove more than 35% of the live foliage at any one pruning visit. This will minimize any stress the tree may experience from loss of foliage. Reduce all branches greater than 1/2 the diameter of the trunk. Select one stem to be the leader, and reduce or remove all branches competing with it. Reduce and/or remove large, vigorous branches low in the canopy, and remove any broken, cracked, or severely damaged branches. The pruning cycle and dose for these first five years should be determined individually for each tree type and size—for example, a pruning visit could be scheduled for year two and year four, or only one visit may be necessary during this period.

Five to Twenty Years after Planting

During this portion of the pruning program do not remove more than 25-30% of the live foliage at one time. Select the lowest permanent limb in the canopy and reduce/remove branches lower than this. Continue to reduce all branches greater than 1/2 the diameter of the trunk. Identify the largest scaffold limbs of the permanent canopy and reduce all branches within 18 inches of these. Reduce branches with included bark, and reduce or remove competing leaders. This can be done in stages if there are more than three competing leaders. Again, the pruning cycle will vary. At least three pruning visits should be scheduled during this period.

Twenty to Thirty Years after Planting

Remove all branches below the first permanent limb by twenty to thirty years after planting. Identify 5-10 permanent scaffold limbs, and reduce branches within 18-60 inches of these to avoid clustered branches. Continue to prevent the development of defects by reducing branches with included bark and those branches competing with the main leader.

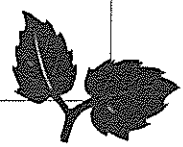
Additional Reading

Illustrated Guide to Pruning

Gilman, E. F. 2002. , 2nd edition. Delmar Publishers, Albany NY.

Landscape Plants

http://hort.ifas.ufl.edu/woody/pruning



This document is ENG 1062, one of the Urban Forest Hurricane Recovery Program series of the School of Forest Resources and Conservation and the Environmental Horticulture Department, Florida Cooperative Extension Service, Institute of Food and Agricultural Sciences, University of Florida. Original publication date September 2007. Reviewed February 2011. Visit the EDIS website at http://edis.ifas.ufl.edu and http://hort.ifas.ufl.edu/treesandhurricanes.

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Design and layout: Mariana Wallig & Julie Walters.

TYPAR® BIOBARRIER

Installation Instructions for Vertical Installation

BEFORE YOU START:

- Contact your utility company prior to trenching if you suspect service lines are present. Consult a professional arborist if root trimming is required.
- Follow all EPA label instructions located on the box and yellow packaging sleeve when installing product. Additional instructions in box.

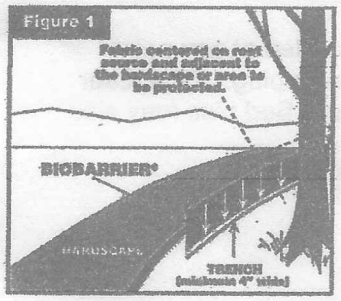
IMPORTANT NOTES:

- Biobarrier should be installed on the side of the trench opposite the root source.
- Install and cover Biobarrier as soon as possible (within 12 hours) after opening sealed yellow bag; high temperatures and direct sunlight can reduce effective product life.

INSTALLING THE PRODUCT:

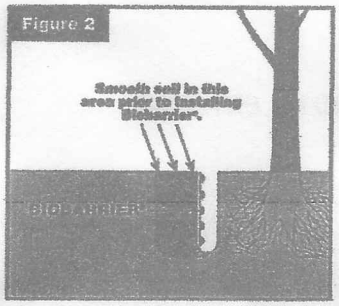
- Cut a trench a minimum of 4 inches (100mm) wide and at least equal to the length of mature tree canopy plus 10 feet, centered on the root source and adjacent to the structure using clean-cutting trench digging equipment (see figure 1).

Figure 1



- Cut all roots back flush to trench walls on both sides of trench. For some species, it may be necessary to spray the cut end of the severed root on the side opposite tree to prevent root regrowth under the hardscape. If this is necessary, use a systematic herbicide and be extremely careful to avoid contact with roots on the opposite side of the trench.
- Smooth soil surface to desired FINAL GRADE LEVEL on side of trench opposite root source (see Figure 2).

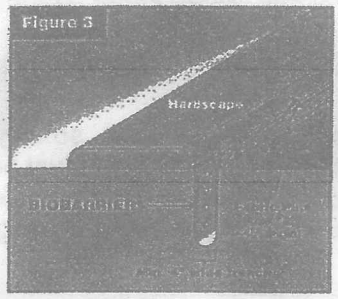
Figure 2



- CAREFULLY open yellow bag of Biobarrier on one end to prevent damage. Use yellow bag to store any unused product.
- Roll out Biobarrier and trim to proper length. Place excess material back in yellow bag and seal tightly with spare ties provided.
- Beginning at one end of the trench, hold product in place at finished grade level on the side of the trench adjacent to the hardscape (opposite root source) and stake in position using pins provided. Use Caution when handling installation pins - they are sharp.

Pins should penetrate fabric between the nodules ~1/4" from the top edge of the fabric and at ~45 degree angle to the trench wall (see Fig. 3). Enough pins are provided to secure fabric every 2 feet. The top edge of the product must be at finished grade level for the entire length of the installation.

Figure 3



- Backfill and tamp firmly to eliminate soil settling. Wet soil, if necessary, to ensure proper soil compaction.

For more information on Biobarrier, or for technical assistance, call toll-free:

1-800-25ROOTS ext. 7500

NOTE:

These guidelines treat a typical urban sidewalk application. Other installations such as property lines, building foundations, retaining walls, ornamental beds, septic systems, storm drains, etc. may require minor procedural adjustments.

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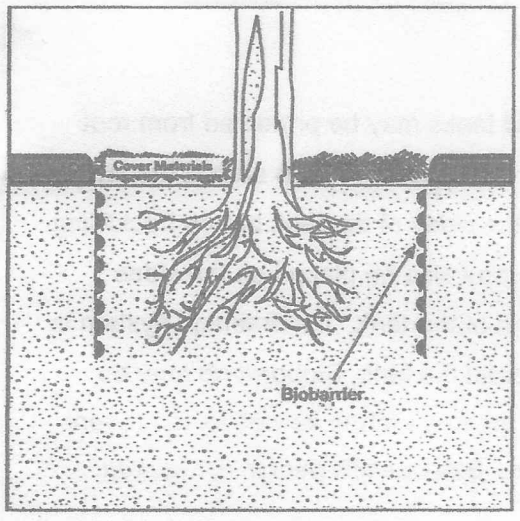


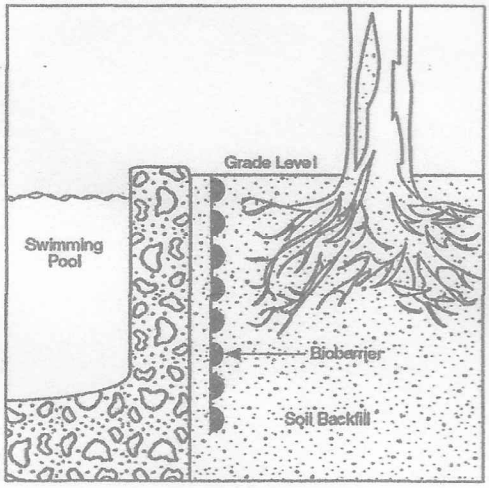
Sidewalks/Paths/Streets/Curbs/Medians/ Tennis Courts

Dig a trench adjacent to hardscape (as close as possible) insuring depth is below where existing roots are found. After trenching, remove remaining roots, leaving walls of trench smooth. Place top edge of Biobarrier® at finished grade level, securing with installation strips and/or pins provided. Backfill carefully to avoid dislocating Biobarrier®, and compact firmly.

Refer to General Guidelines (Pg. 1) & Vertical Instructions (Pg. 2)

Swimming Pools

Dig a trench adjacent to hardscape, pruning and removing any existing roots, leaving trench clean. Place Biobarrier® at finished grade level, securing with installation strips and/or pins provided. Backfill the trench, compacting the dirt firmly to ensure there are no gaps.



Refer to General Guidelines (Pg. 1) & Vertical Instructions (Pg. 2)

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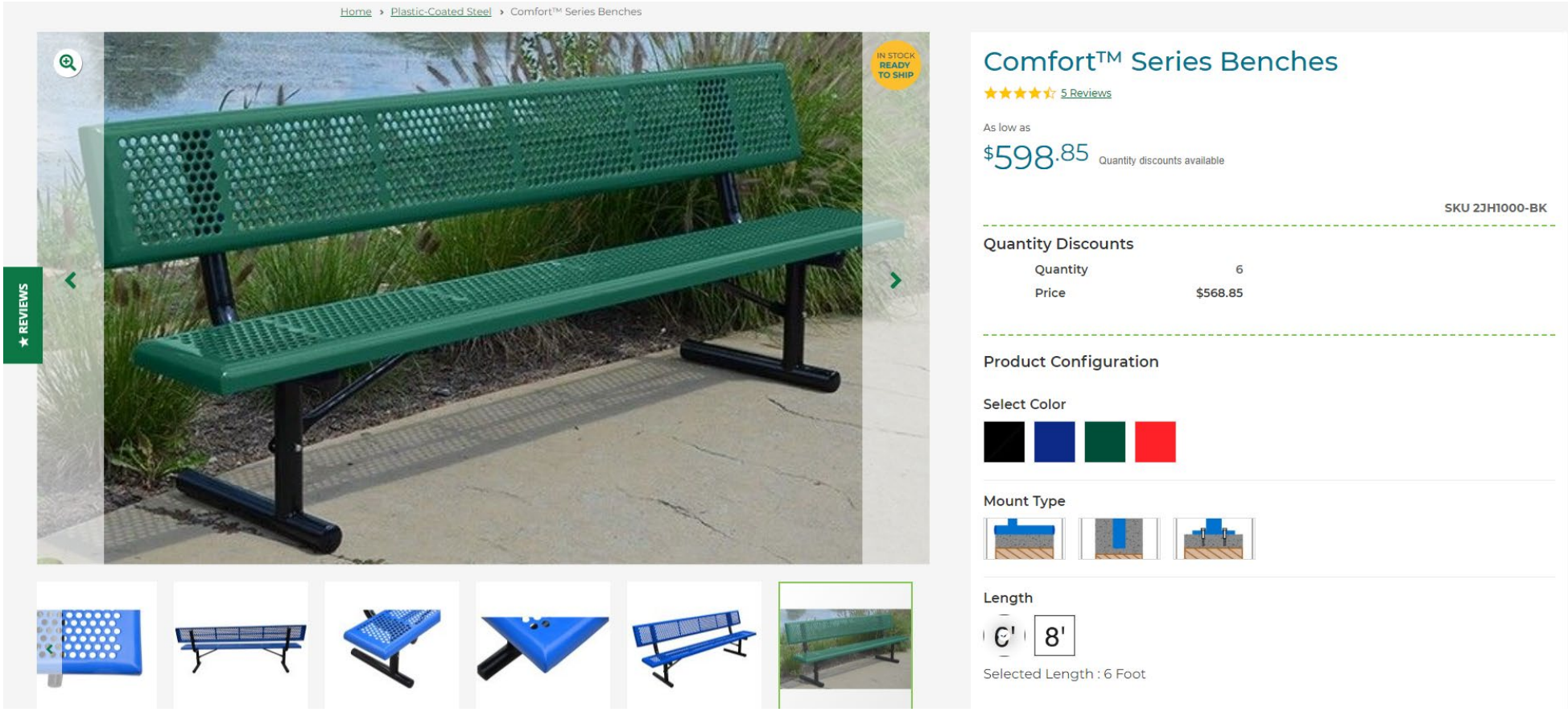

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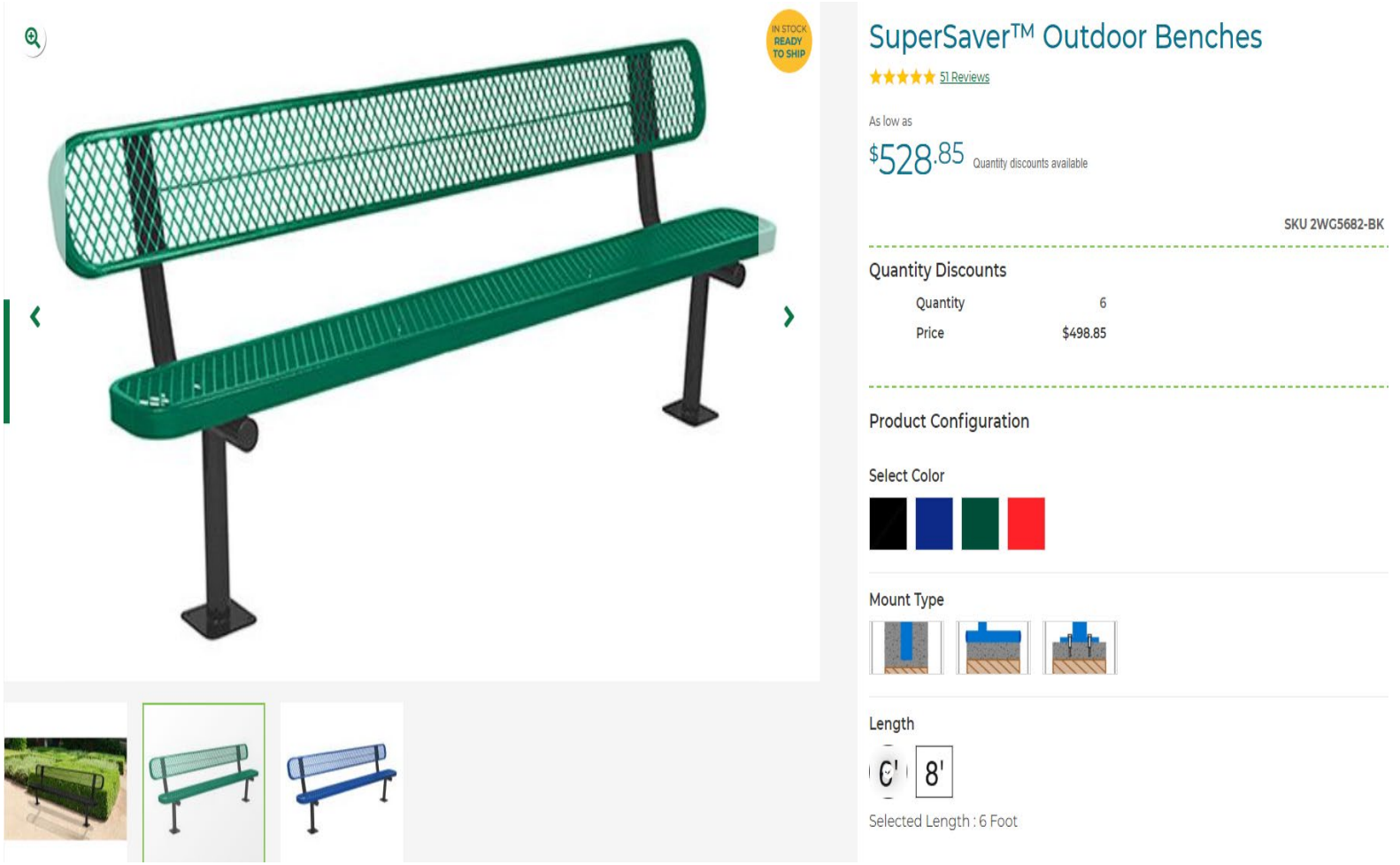

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RESOLUTION NO. 2025-04

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE SUMMERVILLE COMMUNITY DEVELOPMENT DISTRICT APPROVING A PROPOSED BUDGET AND NON-AD VALOREM SPECIAL ASSESSMENTS FOR FISCAL YEAR 2025/2026; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the Board of Supervisors (the "Board") of the Summerville Community Development District (the "District") is required by Section 190.008(2)(a), *Florida Statutes,* to approve a Proposed Budget for each fiscal year; and,

WHEREAS, the Proposed Budget including the Assessments for Fiscal Year 2025/2026 has been prepared and considered by the Board.

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

Section 1. The Proposed Budget including the Assessments for Fiscal Year 2025/2026 attached hereto as Exhibit "A" is approved and adopted by the Board.

Section 2. A Public Hearing is hereby scheduled for September 3, 2025 at 9:00 a.m. in the Kendall Executive Center Second Floor Conference Room located at 8785 SW 165th Avenue, Suite 200, Miami, Florida 33193, for the purpose of receiving public comments on the Proposed Fiscal Year 2025/2026 Budget.

PASSED, ADOPTED and EFFECTIVE this 4th day of June, 2025.

ATTEST:

SUMMERVILLE COMMUNITY DEVELOPMENT DISTRICT

By:_____
Secretary/Assistant Secretary

By:_____
Chairperson/Vice Chairperson

Summerville
Community Development District

Proposed Budget For
Fiscal Year 2025/2026
October 1, 2025 - September 30, 2026

CONTENTS

PROPOSED BUDGET
SUMMERVILLE COMMUNITY DEVELOPMENT DISTRICT
FISCAL YEAR 2025/2026
OCTOBER 1, 2025 - SEPTEMBER 30, 2026

REVENUES		FISCAL YEAR 2025/2026 BUDGET
ADMINISTRATIVE ASSESSMENTS		82,289
MAINTENANCE ASSESSMENTS		102,998
DEBT ASSESSMENTS		197,090
OTHER REVENUES		0
INTEREST INCOME		1,200
TOTAL REVENUES	**$**	**383,577**
EXPENDITURES		
MAINTENANCE EXPENDITURES		
FIELD OPERATIONS MANAGEMENT		720
ENGINEERING/ANNUAL REPORT/INSPECTIONS		2,400
PRESSURE CLEANING		9,498
SIDEWALKS (MILLING & REPLACEMENT)		7,000
HOA CONTRIBUTION (STREET LIGHTS)		16,200
HOA CONTRIBUTION (LANDSCAPING)		58,000
MAINTENANCE CONTINGENCY		3,000
TOTAL MAINTENANCE EXPENDITURES	**$**	**96,818**
ADMINISTRATIVE EXPENDITURES		
SUPERVISOR FEES		5,000
PAYROLL TAXES (EMPLOYER)		383
MANAGEMENT		30,744
SECRETARIAL		4,200
LEGAL		10,000
ASSESSMENT ROLL		7,500
AUDIT FEES		3,600
INSURANCE		7,300
LEGAL ADVERTISING		2,200
MISCELLANEOUS		1,100
POSTAGE		275
OFFICE SUPPLIES		425
DUES & SUBSCRIPTIONS		175
TRUSTEE FEES		3,500
CONTINUING DISCLOSURE FEE		350
WEBSITE MANAGEMENT		2,000
ADMINISTRATIVE CONTINGENCY		600
TOTAL ADMINISTRATIVE EXPENDITURES	**$**	**79,352**
TOTAL EXPENDITURES	**$**	**176,170**
REVENUES LESS EXPENDITURES	**$**	**207,407**
BOND PAYMENTS		(185,265)
BALANCE	**$**	**22,142**
COUNTY APPRAISER & TAX COLLECTOR FEE		(7,647)
DISCOUNTS FOR EARLY PAYMENTS		(15,295)
EXCESS/ (SHORTFALL)	**$**	**(800)**
CARRYOVER FROM PRIOR YEAR		800
NET EXCESS/ (SHORTFALL)	**$**	**-**

DETAILED PROPOSED BUDGET
SUMMERVILLE COMMUNITY DEVELOPMENT DISTRICT
FISCAL YEAR 2025/2026
OCTOBER 1, 2025 - SEPTEMBER 30, 2026

REVENUES	FISCAL YEAR 2023/2024 ACTUAL	FISCAL YEAR 2024/2025 BUDGET	FISCAL YEAR 2025/2026 BUDGET	COMMENTS
ADMINISTRATIVE ASSESSMENTS	79,704	82,306	82,289	Expenditures Less Interest & Carryover/.94
MAINTENANCE ASSESSMENTS	80,880	102,998	102,998	Expenditures/.94
DEBT ASSESSMENTS	195,059	197,090	197,090	Bond Payments/.94
OTHER REVENUES	0	0	0	
INTEREST INCOME	9,015	420	1,200	Projected At $100 Per Month
TOTAL REVENUES	**$ 364,658**	**$ 382,814**	**$ 383,577**	
EXPENDITURES				
MAINTENANCE EXPENDITURES				
FIELD OPERATIONS MANAGEMENT	720	720	720	No Change From 2024/2025 Budget
ENGINEERING/ANNUAL REPORT/INSPECTIONS	1,234	2,400	2,400	No Change From 2024/2025 Budget
PRESSURE CLEANING	10,336	9,498	9,498	No Change From 2024/2025 Budget
SIDEWALKS (MILLING & REPLACEMENT)	0	7,000	7,000	No Change From 2024/2025 Budget
HOA CONTRIBUTION (STREET LIGHTS)	16,200	16,200	16,200	No Change From 2024/2025 Budget
HOA CONTRIBUTION (LANDSCAPING)	17,167	58,000	58,000	For Landscaping, Palm Fert, Mulch, Tree Trimming, etc.
MAINTENANCE CONTINGENCY	1,205	3,000	3,000	Maintenance Contingency
TOTAL MAINTENANCE EXPENDITURES	**$ 46,862**	**$ 96,818**	**$ 96,818**	
ADMINISTRATIVE EXPENDITURES				
SUPERVISOR FEES	1,800	5,000	5,000	Supervisor Fees
PAYROLL TAXES (EMPLOYER)	207	383	383	Supervisor Fees * 7.65%
MANAGEMENT	29,016	29,880	30,744	CPI Adjustment
SECRETARIAL	4,200	4,200	4,200	No Change From 2024/2025 Budget
LEGAL	7,750	10,000	10,000	No Change From 2024/2025 Budget
ASSESSMENT ROLL	7,500	7,500	7,500	As Per Contract
AUDIT FEES	3,400	3,500	3,600	Accepted Amount For 2024/2025 Audit
INSURANCE	6,594	7,200	7,300	Fiscal Year 2024/2025 Expenditure Was $6,858
LEGAL ADVERTISING	1,951	2,000	2,200	Costs Have Increased Due To Closing Of The Miami Business Review
MISCELLANEOUS	1,331	800	1,100	$300 Increase From 2024/2025 Budget
POSTAGE	313	275	275	No Change From 2024/2025 Budget
OFFICE SUPPLIES	265	425	425	$25 Decrease From 2024/2025 Budget
DUES & SUBSCRIPTIONS	175	175	175	No Change From 2024/2025 Budget
TRUSTEE FEES	3,500	3,500	3,500	No Change From 2024/2025 Budget
CONTINUING DISCLOSURE FEE	350	350	350	No Change From 2024/2025 Budget
WEBSITE MANAGEMENT	2,000	2,000	2,000	No Change From 2024/2025 Budget
ADMINISTRATIVE CONTINGENCY	0	600	600	No Change From 2024/2025 Budget
TOTAL ADMINISTRATIVE EXPENDITURES	**$ 70,352**	**$ 77,788**	**$ 79,352**	
TOTAL EXPENDITURES	**$ 117,214**	**$ 174,606**	**$ 176,170**	
REVENUES LESS EXPENDITURES	**$ 247,444**	**$ 208,208**	**$ 207,407**	
BOND PAYMENTS	(185,598)	(185,265)	(185,265)	2026 P&I Payments Less Interest
BALANCE	**$ 61,846**	**$ 22,943**	**$ 22,142**	
COUNTY APPRAISER & TAX COLLECTOR FEE	(3,414)	(7,647)	(7,647)	Two Percent Of Total Assessment Roll
DISCOUNTS FOR EARLY PAYMENTS	(13,806)	(15,296)	(15,295)	Four Percent Of Total Assessment Roll
EXCESS/ (SHORTFALL)	**$ 44,626**	**$ -**	**$ (800)**	
CARRYOVER FROM PRIOR YEAR	0	0	800	Carryover From Prior Year
NET EXCESS/ (SHORTFALL)	**$ 44,626**	**$ -**	**$ -**	

DETAILED PROPOSED DEBT SERVICE FUND BUDGET
SUMMERVILLE COMMUNITY DEVELOPMENT DISTRICT
FISCAL YEAR 2025/2026
OCTOBER 1, 2025 - SEPTEMBER 30, 2026

REVENUES	FISCAL YEAR 2023/2024 ACTUAL	FISCAL YEAR 2024/2025 BUDGET	FISCAL YEAR 2025/2026 BUDGET	COMMENTS
Interest Income	6,168	500	1,000	Projected Interest For 2025/2026
NAV Tax Collection	185,598	185,265	185,265	Maximum Debt Service Collection
Total Revenues	**$ 191,766**	**$ 185,765**	**$ 186,265**	
EXPENDITURES				
Principal Payments	118,000	121,000	127,000	Principal Payment Due In 2026
Interest Payments	67,525	62,170	58,133	Interest Payments Due In 2026
Bond Redemption	0	2,595	1,132	Estimated Excess Debt Collections
Total Expenditures	**$ 185,525**	**$ 185,765**	**$ 186,265**	
Excess/ (Shortfall)	**$ 6,241**	**$ -**	**$ -**	

Series 2020 Bond Refunding Information

Original Par Amount =	$2,193,000	Annual Principal Payments Due =	May 1st
Interest Rate =	3.0% - 4.00%	Annual Interest Payments Due =	May 1st & November 1st
Issue Date =	December 2020		
Maturity Date =	May 2036		
Par Amount As Of 1/1/25 =	$1,733,000		

Summerville Community Development District
Assessment Comparison

	Fiscal Year 2022/2023 Assessment Before Discount*	Fiscal Year 2023/2024 Assessment Before Discount*	Fiscal Year 2024/2025 Assessment Before Discount*	**Fiscal Year 2025/2026 Projected Assessment Before Discount***
Administrative	$ 295.84	$ 299.21	$ 308.27	**$ 308.21**
Maintenance	$ 310.06	$ 306.08	$ 385.76	**$ 385.76**
Debt	$ 738.17	$ 738.17	$ 738.17	**$ 738.17**
Total	**$ 1,344.07**	**$ 1,343.46**	**$ 1,432.20**	**$ 1,432.14**

* Assessments Include the Following :

4% Discount for Early Payments

1% County Tax Collector Fee

1% County Property Appraiser Fee

Community Information:

Total Units	267