



To: Board of Supervisors

From: District Management

Date: October 1, 2025

RE: HB7013 – Special Districts Performance Measures and Standards

To enhance accountability and transparency, new regulations were established for all special districts, by the Florida Legislature, during their 2024 legislative session. Starting on October 1, 2024, or by the end of the first full fiscal year after its creation (whichever comes later), each special district must establish goals and objectives for each program and activity, as well as develop performance measures and standards to assess the achievement of these goals and objectives. Additionally, by December 1 each year (initial report due on December 1, 2025), each special district is required to publish an annual report on its website, detailing the goals and objectives achieved, the performance measures and standards used, and any goals or objectives that were not achieved.

District Management has identified the following key categories to focus on for Fiscal Year 2026 and develop statutorily compliant goals for each:

- Community Communication and Engagement
- Infrastructure and Facilities Maintenance
- Financial Transparency and Accountability

Additionally, special districts must provide an annual reporting form to share with the public that reflects whether the goals & objectives were met for the year. District Management has streamlined these requirements into a single document that meets both the statutory requirements for goal/objective setting and annual reporting.

The proposed goals/objectives and the annual reporting form are attached as exhibit A to this memo. District Management recommends that the Board of Supervisors adopt these goals and objectives to maintain compliance with HB7013 and further enhance their commitment to the accountability and transparency of the District.

Exhibit A:
Goals, Objectives and Annual Reporting Form

Quail Roost Community Development District Performance Measures/Standards & Annual Reporting Form

October 1, 2025 – September 30, 2026

1. Community Communication and Engagement

Goal 1.1: Public Meetings Compliance

Objective: Hold at least three regular Board of Supervisor meetings per year to conduct CDD related business and discuss community needs.

Measurement: Number of public board meetings held annually as evidenced by meeting minutes and legal advertisements.

Standard: A minimum of three board meetings were held during the Fiscal Year.

Achieved: Yes ☒ No ☐

Meetings - Fiscal Year 2026

- October 10, 2025 - Cancelled
- November 14, 2025 - Held
- December 12, 2025 - Cancelled
- January 9, 2026 - Cancelled
- February 13, 2026 - Cancelled
- March 13, 2026 - Held
- April 10, 2026 - Held
- May 8, 2026 - Cancelled
- June 12, 2026 - Held
- July 10, 2026 - Cancelled
- August 14, 2026 - Cancelled
- September 11, 2026 - Held

Goal 1.2: Notice of Meetings Compliance

Objective: Provide public notice of meetings in accordance with Florida Statutes, using at least two communication methods.

Measurement: Timeliness and method of meeting notices as evidenced by posting to CDD website, publishing in local newspaper and via electronic communication.

Standard: 100% of meetings were advertised per Florida statute on at least two mediums (i.e., newspaper, CDD website, electronic communications).

Achieved: Yes ☒ No ☐

Goal 1.3: Access to Records Compliance

Objective: Ensure that meeting minutes and other public records are readily available and easily accessible to the public by completing monthly CDD website checks.

Measurement: Monthly website reviews will be completed to ensure meeting minutes and other public records are up to date as evidenced by District Management's records.

Standard: 100% of monthly website checks were completed by District Management.

Achieved: Yes ☒ No ☐

2. Infrastructure and Facilities Maintenance

Goal 2.1: Field Management and/or District Management Site Inspections

Objective: Field manager and/or district manager will conduct inspections per District Management services agreement to ensure safety and proper functioning of the District's infrastructure.

Measurement: Field manager and/or district manager visits were successfully completed per management agreement as evidenced by field manager and/or district manager's reports, notes or other record keeping method.

Standard: 100% of site visits were successfully completed as described within district management services agreement

Achieved: Yes ☒ No ☐

Note: Field Reports were completed monthly, distributed to the Board, and posted on the District's website. All meeting agendas were posted on the District's website.

Goal 2.2: District Infrastructure and Facilities Inspections

Objective: District Engineer will conduct an annual inspection of the District's infrastructure and related systems.

Measurement: A minimum of one inspection completed per year as evidenced by district engineer's report related to district's infrastructure and related systems.

Standard: Minimum of one inspection was completed in the Fiscal Year by the district's engineer.

Achieved: Yes ☒ No ☐

Note: District Engineer's Report was completed and included in the September 11th Quail Roost Meeting agenda.

3. Financial Transparency and Accountability

Goal 3.1: Annual Budget Preparation

Objective: Prepare and approve the annual proposed budget by June 15 and final budget was adopted by September 30 each year.

Measurement: Proposed budget was approved by the Board before June 15 and final budget was adopted by September 30 as evidenced by meeting minutes and budget documents listed on CDD website and/or within district records.

Standard: 100% of budget approval & adoption were completed by the statutory deadlines and posted to the CDD website.

Achieved: Yes ☒ No ☐

Note: The FY 2027 Budget was adopted on June 12, 2026.

Goal 3.2: Financial Reports

Objective: Publish to the CDD website the most recent versions of the following documents: Annual audit, current fiscal year budget with any amendments, and most recent financials within the latest agenda package.

Measurement: Annual audit, previous years' budgets, and financials are accessible to the public as evidenced by corresponding documents on the CDD's website.

Standard: CDD website contains 100% of the following information: Most recent annual audit, most recent adopted/amended fiscal year budget, and most recent agenda package with updated financials.

Achieved: Yes ☒ No ☐

Goal 3.3: Annual Financial Audit

Objective: Conduct an annual independent financial audit per statutory requirements and publish the results to the CDD website for public inspection, and transmit to the State of Florida.

Measurement: Timeliness of audit completion and publication as evidenced by meeting minutes showing board approval and annual audit is available on the CDD's website and transmitted to the State of Florida.

Standard: Audit was completed by an independent auditing firm per statutory requirements and results were posted to the CDD website and transmitted to the State of Florida.

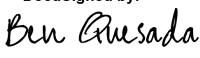
Achieved: Yes ☒ No ☐

Note: The FY 2025 Audit Report was accepted on June 12, 2026, and posted on the District's website.

DocuSigned by:

94784E94D2FF4EE...
Chair/Vice Chair: _____
Print Name: Teresa Baluja
Bellagio Community Development District

Date: 2026-09-11

DocuSigned by:

07C0606FB7194F3...
District Manager: _____
Print Name: Ben Quesada
Bellagio Community Development District

Date: 2026-09-11

Certificate Of Completion

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Status: Completed

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Document Pages: 17

Signatures: 8

Envelope Originator:

Certificate Pages: 2

Initials: 0

Ellen Acosta

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1001 Bradford Way

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Kingston, TN 37763

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eacosta@gmssf.com

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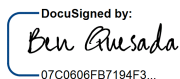
Signer Events

Ben Quesada

BQuesada@gmssf.com

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(None)

Signature

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Electronic Record and Signature Disclosure:

Not Offered via Docusign

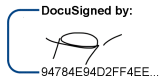
Teresa Baluja

teresa.baluja@lennar.com

Chair/ Vice Chair

Lennar Homes LLC

Security Level: Email, Account Authentication
(None)

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Electronic Record and Signature Disclosure:

Not Offered via Docusign

In Person Signer Events

Signature

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Editor Delivery Events

Status

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Agent Delivery Events

Status

Timestamp

Intermediary Delivery Events

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Certified Delivery Events

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Carbon Copy Events

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Timestamp

Witness Events

Signature

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Notary Events

Signature

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Envelope Summary Events

Status

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Hashed/Encrypted

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Envelope Updated

Security Checked

9/11/2026 10:48:30 AM

Envelope Updated

Security Checked

9/11/2026 10:48:30 AM

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