



**BLUE LAKE
COMMUNITY DEVELOPMENT
DISTRICT**

**LEE COUNTY
REGULAR BOARD MEETING
APRIL 8, 2025
3:00 P.M.**

Special District Services, Inc.
The Oaks Center
2501A Burns Road
Palm Beach Gardens, FL 33410

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

**AGENDA
BLUE LAKE
COMMUNITY DEVELOPMENT DISTRICT**

WildBlue Social Building
18721 WildBlue Boulevard
Fort Myers, Florida 33913

REGULAR BOARD MEETING

April 8, 2025

3:00 P.M.

Call- In: (800) 743-4099 Passcode: 7423990 (for residents)

- A. Call to Order
- B. Proof of Publication.....Page 1
- C. Establish Quorum
- D. Additions or Deletions to Agenda
- E. Approval of Minutes
 - 1. March 11, 2025 Regular Board Meeting.....Page 2
- F. Old Business
 - 1. Update on Negotiations with Developer
 - 2. Update on Financing from Seacoast Bank
 - Consideration of Loan Approval Resolution.....Page 7
 - 3. Update on Lake Bank Repair Project
 - 4. Reconsideration on Repairs for 14462 Blue Bay Circle – DiNitto Property.....Page 8
- G. New Business
 - 1. Discussion Regarding Baracco Estimates to Build Revetment
- H. Administrative Matters
 - 1. Manager’s Report
 - Financials.....Page 11
 - Next Meeting – April 22 and May 13
 - 2. Engineer’s Report
 - 3. Attorney’s Report
- I. Comments from the Public for Items Not on the Agenda
- J. Board Member Comments
 - 1. Discussion Regarding Requirements to Remove CDD from Deed at County for Lake and Other Properties - Bello
 - 2. Consideration of Board Vacancy Candidates.....Page 14
- K. Adjourn



Florida

PO Box 631244 Cincinnati, OH 45263-1244

GANNETT

AFFIDAVIT OF PUBLICATION

Laura Archer
Blue Lake Comm. Development
2501 Burns RD # A
Palm Beach Gardens FL 33410-5207

**BLUE LAKE COMMUNITY
DEVELOPMENT DISTRICT
NOTICE OF APRIL 2025 REGU-
LAR BOARD MEETINGS**
NOTICE IS HEREBY GIVEN that the Board of Supervisors of the Blue Lake Community Development District will hold two (2) Regular Board Meetings in the WildBlue Social Building located at 18721 WildBlue Boulevard, Fort Myers, Florida 33913 at 3:00 p.m. on April 8, 2025, and April 22, 2025.

The purpose of the meetings is to address any business to properly come before the Board. The meetings are open to the public and will be conducted in accordance with the provisions of Florida law. A copy of the agendas for these meetings may be obtained from the District's website or by contacting the District Manager at 239-444-5790 and/or toll free at 1-877-737-4922 prior to the date of the meetings.

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

If any person decides to appeal any decision made with respect to any matter considered at these meetings, such person will need a record of the proceedings and such person may need to 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 these meetings should contact the District Manager at 239-444-5790 and/or toll free at 1-877-737-4922 at least seven (7) days prior to the dates of the meetings.

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

**BLUE LAKE COMMUNITY
DEVELOPMENT DISTRICT**
www.bluelakecdd.org
No.11163510

March 31, 2025

STATE OF WISCONSIN, COUNTY OF BROWN

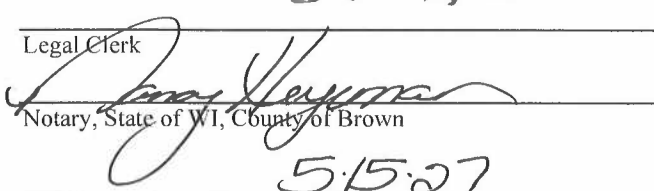
Before the undersigned authority personally appeared, who on oath says that he or she is the Legal Advertising Representative of the Naples Daily News, a newspaper published in Collier County, Florida; that the attached copy of advertisement, being a Legal Ad in the matter of Govt Public Notices, was published on the publicly accessible website of Collier and Lee Counties, Florida, or in a newspaper by print in the issues of, on:

03/31/2025

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

Subscribed and sworn to before me, by the legal clerk, who is personally known to me, on 03/31/2025

Legal Clerk


Notary, State of WI, County of Brown

5.15.27

My commission expires

Publication Cost: \$245.04
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Order No: 11163510 # of Copies:
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NANCY HEYRMAN
Notary Public
State of Wisconsin

**BLUE LAKE COMMUNITY DEVELOPMENT DISTRICT
REGULAR BOARD MEETING
MARCH 11, 2025**

A. CALL TO ORDER

The March 11, 2025, Regular Board Meeting of the Blue Lake Community Development District (the “District”) was called to order at 3:00 p.m. in the WildBlue Social Building located at 18721 WildBlue Boulevard, Fort Myers, Florida 33966.

B. PROOF OF PUBLICATION

Proof of publication was presented which showed that notice of the Regular Board Meeting had been published in the *Naples Daily News* on March 3, 2025, as legally required.

C. CONSIDER RESIGNATION AND APPOINTMENT TO BOARD VACANCIES

A **motion** was made by Mr. Hasty, seconded by Mr. Rapponotti and passed unanimously accepting the resignations of Scott Edwards and Matt Shorey.

Mr. Haber went over the process whereby the remaining Board Members fill the vacancies. Ms. Meneely stated that Seat #2, which was previously held by Mr. Edwards has a term expiring in November 2026 while Seat #5, which was previously held by Mr. Shorey, has a November 2028 term expiration.

Mr. Rapponotti asked if there was a notice provision and Mr. Haber stated that there was not as they are currently landowner seats. He did point out that once they are appointed they are required to vote on all items so they may want to consider appointing new Board Members at the end of the meeting.

Ms. Meneely advised that the resumes handed out were from Douglas Henry and Norbie Larsen, noting that Mr. Larsen was present. Mr. Larsen went over his background and expressed desire to be on the Board.

Mr. Hasty went over some of the responsibilities of the position including financial reporting, the Sunshine Law, ethics training and meeting attendance. He asked Mr. Larsen if he was a full-time resident and Mr. Larsen responded that he was in Florida 7 months out of the year but could attend by phone or return to the State, if necessary. Mr. Rapponotti stated that Mr. Larsen had a good resume with a construction background that would be helpful. Mr. Bello suggested filling one seat at the end of today’s meeting and then having the HOA put out a vacancy announcement to residents. There was a consensus of the Board to do so.

D. ADMINISTER OATH OF OFFICE AND REVIEW BOARD MEMBER DUTIES & RESPONSIBILITIES

This item was moved to the end of today’s meeting.

E. ESTABLISH A QUORUM

It was determined that the attendance of the following Board Members constituted a quorum:

Chairman	Chris Hasty	Present
Vice Chairman	Vacant	
Supervisor	Vacant	
Supervisor	David Bello	Present
Supervisor	Mark Rapponotti	Present

Also present were the following Staff Members:

District Manager	Kathleen Meneely	Special District Services, Inc.
District Counsel	Wes Haber (via phone)	Kutak Rock LLP
District Engineer	Frank Savage	Barraco and Associates, Inc.

Also present were the following District residents: Greg Gosney, Sandra Wendling, Tom Jusror, Jim Spaulding, Don & Beth Johnson, Gregory Miholic, Norbie Lasen, Steve Hamburger, Linda Jones (HOA Pres) and other residents via phone.

F. ADDITIONS OR DELETIONS TO AGENDA

There were no additions or deletions to the agenda.

G. APPROVAL OF MINUTES

1. February 11, 2025, Regular Board Meeting

The minutes of the February 11, 2025, Regular Board Meeting were presented for consideration.

Mr. Hasty noted that the first paragraph of Section H1, “preservers” should be “preserves.”

A **motion** was then made by Mr. Bello, seconded by Mr. Rapponotti and passed unanimously approving the minutes of the February 11, 2025, Regular Board Meeting, as amended.

H. OLD BUSINESS

1. Update on Lake Bank Repair Project

Mr. Haber went over the background of the project, noting that in the past, the Board gave direction to litigation counsel to negotiate business terms of a contribution agreement with the developer. They also hired Taylor Engineering to see if the terms were reasonable and appropriate. He stated that the Board Members all had conversations with litigation counsel on the next steps in light of what was in the report from Taylor Engineering. He further stated that litigation counsel was now looking for Board direction. Mr. Bello stated that the Taylor report was very thorough. Mr. Rapponotti stated that this has dragged on and suggested mediation so that negotiations take place in a meaningful way with a timeline. He also suggested sending a demand letter with a timeline and if a positive response is not received then Counsel could be authorized to follow their recommendation. Mr. Hasty stated that prior direction was to negotiate on business terms and now it should be to do that on the entire offer with flexibility on how that will get done. Mr. Bello stated that the current offer would not cover any improvements to the remainder of the lake that was not damaged and Mr. Hasty stated that Lennar made the offer without litigation and the engineering report says what the repair should be, noting that the Board’s direction was a revetment which is stronger although not necessarily more aesthetically pleasing.

After further discussion, a **motion** was made by Mr. Hasty, seconded by Mr. Rapponoti and passed unanimously directing litigation counsel to discuss the entire offer with the developer and advise by March 30, 2025, if making any meaningful progress.

Mr. Miholic asked about obtaining a copy of the Taylor report and Mr. Hasty stated that at this time it was confidential as an attorney/client privilege. Mr. Haber stated that he would check with litigation counsel to find out if it is still a benefit to keep the report confidential. Mr. Larsen asked why the District could not put out a bid and get numbers for the total cost of the project and Mr. Hasty stated that Florida law requires a full scope, bond, sealed bids and criteria which is why the design was needed.

2. Update on Cross Section Repair Design for 14462 Blue Bay Circle – DiNitto Property

Mr. Savage stated they had been instructed to develop a cross section which he handed out at the meeting, noting that this was not meant to be a permanent solution but a band aid until the lake bank repairs are completed. Mr. Bello asked about the cost for the design and Mr. Savage stated it was between \$20,000-\$25,000. Mr. Hamberger questioned the expense since it was a precedent that would be set for additional properties seeking remediation outside of the project. Mr. Rapponotti stated that it was done for another property and Mr. Hasty clarified that on the Nusbaum property, the berm was breached and impacted the stormwater pipes for pre-treatment which would violate the permit. He continued that the DiNitto property did not appear to breach the berm so it does not rise to the level of emergency. Mr. Bello stated that correcting the erosion could wait but he fears that safety was an issue. He suggested, since the repair would need to be taken out, that in the meantime it be back filled and sodded. Mr. Hasty agreed that this was a less expensive repair as well as the fact that soil and sod would not need to be ripped out later. Mr. Savage stated that backfill and sod would cost about \$5,000.

A **motion** was made by Mr. Bello, seconded by Mr. Rapponoti and passed unanimously directing the engineer to proceed with the backfill and sod repair on the property.

3. Update on Financing from Seacoast Bank

Mr. Haber went over a conference call with staff and Seacoast Bank, noting that there were some misunderstandings on what the underwriters were requesting versus where the CDD was on repairs and letting contracts. Ms. Meneely noted that she had further conversations with Seacoast and indicated that they would like to advance the engineering fees and require construction contracts prior to funding, not closing, for the additional funds. She added that the bank was looking for the Board to let them know if they intend to increase the \$2.5 Million total amount or if that will be increased. Mr. Hasty stated that he viewed this as a bridge loan in order to get the project moving and as more funds are needed a full bond would be issued.

A **motion** was made by Mr. Hasty, seconded by Mr. Rapponotti and passed unanimously to stay with the \$2.5 Million loan amount.

I. NEW BUSINESS

There were no New Business items to come before the Board.

J. ADMINISTRATIVE MATTERS

1. Manager's Report

Ms. Meneely went over the financials. There were no questions from the Board Members.

Ms. Meneely advised that the next meeting was scheduled for March 25, 2025 and that she had no actionable items for that meeting. It was the consensus of the Board to cancel the March 25, 2025, meeting.

Ms. Meneely pointed out that the next meeting would then be April 8, 2025.

2. Engineer's Report

The District Engineer had nothing further.

3. Attorney's Report

Mr. Haber had nothing further to report.

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

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

L. BOARD MEMBER COMMENTS

There were no further comments from the Board Members.

Appointments to Board Vacancies (continued from beginning of meeting)

Discussion ensued regarding the filling of the vacancy.

A motion was made by Mr. Bello, seconded by Mr. Rapponotti and passed unanimously appointing Norbie Larsen to Seat #2 with an expiration date of November 2026.

Mr. Meneely then administered the oath of office to Mr. Larsen. Mr. Haber stated that he would get with Mr. Larsen via phone to go over the responsibilities and laws regarding the position.

M. ADJOURNMENT

There being no further business to come before the Board, a **motion** was made by Mr. Larsen, seconded by Mr. Bello and passed unanimously adjourning the Regular Board Meeting at 4:56 p.m.

ATTESTED BY:

Secretary/Assistant Secretary

Chairperson/Vice-Chair

**CONSIDERATION OF LOAN APPROVAL
RESOLUTION**

**TO BE DISTRIBUTED
UNDER SEPARATE COVER**

Crocker Land Development, LLC.
 9780 Littleton Road
 North Fort Myers, FL 33903

Estimate

Date 3/12/2025
 Estimate # 628

Name / Address

Blue Lake Community
 14462 Blue Bay Circle
 Fort Myers, FL

P.O. #
 Terms

Due Date 3/12/2025
 Other

Description	Qty	Rate	Total
14462 Blue Bay Circle - Blue Lake Community Crocker Land Development (CLD) Scope of work - CLD will start with filling the damaged seawall gap with concrete bags between the existing seawall failure to help prevent future washouts through this opening. Then will begin In-hauling clean fill to the landing of the drainage easement, then haul the fill from the landing through the easement (approx 200') with a skidsteer to the washed out area along the seawall. Once filled to the proposed berm grade CLD will final grade the slopes to match the existing sod. Once graded and compacted CLD will install Coconut Mat to help prevent future erosions on the slopes, then sod the newly graded berm and any of the easements that's damaged during the project with Flortam sod. Estimate includes the labor, equipment, material and fuel needed to complete the job.		10,925.00	10,925.00
Please contact Devin Collier with any questions 239-747-3892		Subtotal	
		Sales Tax (0.0%)	
		Total	

Crocker Land Development, LLC.
 kelley@crockerlanddevelopment.com

239-229-8003
 239-997-5129

Crocker Land Development, LLC.
 9780 Littleton Road
 North Fort Myers, FL 33903

Estimate

Date 3/12/2025
 Estimate # 628

Name / Address

Blue Lake Community
 14462 Blue Bay Circle
 Fort Myers, FL

P.O. #
 Terms

Due Date 3/12/2025
 Other

Description	Qty	Rate	Total
<p>This estimate does not include any cost to repair any potential damaged concrete sidewalks and/or curbing caused while completing this project in an effort not to raise the actual cost of the job as listed above just in case the repairs are not needed ,the community agrees to pay CLD to repair any damaged concrete on a time and material basis. That being said CLD will do their best to not break any concrete by putting steel plates on the curbs and sidewalks to help with getting over them with equipment and dump trucks.</p> <p>Due to future heavy rain events, community drainage issues and the existing damage seawall CLD does not guarantee that future erosions will not occur during or after the repair. The community agrees to pay CLD to repair any washouts on a time and material basis.</p> <p>The community agrees to add irrigation if needed to care for the new sod at the communities expense.</p> <p>CLD is not responsible for: - Any permits. - Silt fence.</p>			
<p>Please contact Devin Collier with any questions 239-747-3892</p>		<p>Subtotal Sales Tax (0.0%) Total</p>	

Crocker Land Development, LLC.
 kelley@crockerlanddevelopment.com

239-229-8003
 239-997-5129

Crocker Land Development, LLC.
 9780 Littleton Road
 North Fort Myers, FL 33903

Estimate

Date 3/12/2025
 Estimate # 628

Name / Address

Blue Lake Community
 14462 Blue Bay Circle
 Fort Myers, FL

P.O. #
 Terms

Due Date 3/12/2025
 Other

Description	Qty	Rate	Total
<ul style="list-style-type: none"> - The damage of any Irrigation. - The installation of any new Irrigation. - Watering or care of any new sod. - Densities or proctors testing. - Survey/Layout or asbuilts. <p>Estimate good for 30 days. Final payment due within 15 days of project completion.</p> <p>Owner Signature _____ Date _____</p>			
Please contact Devin Collier with any questions 239-747-3892		Subtotal Sales Tax (0.0%) Total	\$10,925.00 \$0.00 \$10,925.00

Crocker Land Development, LLC.
 kelley@crockerlanddevelopment.com

239-229-8003
 239-997-5129

Blue Lake
Community Development District

**Financial Report For
March 2025**

**BLUE LAKE COMMUNITY DEVELOPMENT DISTRICT
MONTHLY FINANCIAL REPORT
MARCH 2025**

	Annual Budget 10/1/24 - 9/30/25	Actual Mar-25	Year To Date Actual 10/1/24 - 3/31/25
REVENUES			
O & M Assessments	581,132	9,532	558,560
Debt Assessments	661,941	10,858	636,221
Other Revenues	480	0	0
Interest Income	0	0	4,706
Total Revenues	\$ 1,243,553	\$ 20,390	\$ 1,199,487
EXPENDITURES			
Administrative Expenditures			
Supervisor Fees	12,000	400	2,400
Payroll Taxes (Employer)	960	31	184
Management	30,576	2,548	15,288
Legal	40,000	0	14,767
Legal Extraordinary - Retaining Wall	0	0	16,015
Assessment Roll	4,000	0	0
Audit Fees	4,100	0	0
Arbitrage Rebate Fee	650	0	0
Insurance	13,610	0	12,850
Legal Advertisements	6,000	0	1,626
Miscellaneous	2,000	149	1,739
Postage	700	31	286
Office Supplies	1,050	110	924
Dues & Subscriptions	175	0	175
Trustee Fee	4,050	0	0
Continuing Disclosure Fee	1,000	0	0
Deficit Funding (FY 2022/2023)	41,373	0	0
Total Administrative Expenditures	162,244	3,269	66,254
Maintenance Expenditures			
Engineering/Inspections	40,000	0	25,006
Engineering Extraordinary - Retaining Wall	0	0	39,106
Mitigation Monitoring	138,500	89,153	151,708
Lake Maintenance	60,000	2,866	25,947
Flow Way Inspection Certification	5,000	0	0
Detention Area Maintenance	36,000	2,896	17,373
Miscellaneous Maintenance (Fence Repairs, Stabilization Analysis, etc.)	55,000	0	4,108
Maintenance Reserve	50,000	0	0
Vista Dry Retention Area	0	0	3,900
Total Maintenance Expenditures	384,500	94,915	267,148
Total Expenditures	\$ 546,744	\$ 98,184	\$ 333,402
REVENUES LESS EXPENDITURES	\$ 696,809	\$ (77,794)	\$ 866,085
Bond Payments	(623,875)	(10,717)	(611,183)
BALANCE	\$ 72,934	\$ (88,511)	\$ 254,902
County Appraiser & Tax Collector Fee	(24,312)	0	(1,201)
Discounts For Early Payments	(48,622)	(263)	(45,820)
EXCESS/ (SHORTFALL)	\$ -	\$ (88,774)	\$ 207,881
Carryover From Prior Year	0	0	0
NET EXCESS/ (SHORTFALL)	\$ -	\$ (88,774)	\$ 207,881

Bank Balance As Of 3/31/25	\$ 465,772.50
Accounts Payable As Of 3/31/25	\$ 138,473.31
Accounts Receivable As Of 3/31/25	\$ -
Available Funds As Of 3/31/25	\$ 327,299.19

**BLUE LAKE CDD
TAX COLLECTIONS
2024/2025**

#	ID#	PAYMENT FROM	DATE	FOR	Tax Collect Receipts	Interest Received	Commissions Paid	Discount	Net From Tax Collector	O & M Assessment Income (Before Discounts & Fee)	Debt Assessment Income (Before Discounts & Fee)	O & M Assessment Income (After Discounts & Fee)	Debt Assessment Income (After Discounts & Fee)	Debt Assessments Paid to Trustee
									\$1,243,073.00	\$581,132.00	\$ 661,941.00	\$581,132.00	\$ 661,941.00	
									\$1,170,139.00	\$546,264.00	\$ 623,875.00	\$546,264.00	\$ 623,875.00	\$ 623,875.00
1		Paid to Lee County Prop Appraiser	11/12/24	Fees			\$ (423.00)		\$ (423.00)			\$ (198.00)	\$ (225.00)	
2	1	Lee County Tax Collector	11/14/24	NAV Taxes	\$ 4,474.37		\$ (778.32)	\$ (234.91)	\$ 3,461.14	\$ 2,091.77	\$ 2,382.60	\$ 1,618.04	\$ 1,843.10	\$ 1,618.10
3	2	Lee County Tax Collector	11/26/24	NAV Taxes	\$ 227,303.84			\$ (9,091.89)	\$ 218,211.95	\$ 106,264.54	\$ 121,039.30	\$ 102,014.05	\$ 116,197.90	\$ 116,197.90
4	3	Lee County Tax Collector	12/11/24	NAV Taxes	\$ 779,869.44			\$ (31,193.92)	\$ 748,675.52	\$ 364,588.94	\$ 415,280.50	\$ 350,005.77	\$ 398,669.75	\$ 398,669.75
5	4	Lee County Tax Collector	12/30/24	NAV Taxes	\$ 66,092.31			\$ (2,536.35)	\$ 63,555.96	\$ 30,898.11	\$ 35,194.20	\$ 29,712.36	\$ 33,843.60	\$ 33,843.60
6	5	Lee County Tax Collector	01/15/25	NAV Taxes	\$ 44,524.43			\$ (1,335.75)	\$ 43,188.68	\$ 20,815.13	\$ 23,709.30	\$ 20,190.63	\$ 22,998.05	\$ 22,998.05
7	6	Lee County Tax Collector	02/13/25	NAV Taxes	\$ 52,127.12			\$ (1,164.35)	\$ 50,962.77	\$ 24,369.42	\$ 27,757.70	\$ 23,825.07	\$ 27,137.70	\$ 27,137.70
8	7	Lee County Tax Collector	03/13/25	NAV Taxes	\$ 20,389.88			\$ (263.31)	\$ 20,126.57	\$ 9,532.23	\$ 10,857.65	\$ 9,409.12	\$ 10,717.45	\$ 10,717.45
9									\$ -					\$ -
10									\$ -					\$ -
11									\$ -					\$ -
12									\$ -					\$ -
13									\$ -					\$ -
14									\$ -					\$ -
15									\$ -					\$ -
					\$ 1,194,781.39	\$ -	\$ (1,201.32)	\$ (45,820.48)	\$ 1,147,759.59	\$ 558,560.14	\$ 636,221.25	\$ 536,577.04	\$ 611,182.55	\$ 611,182.55

Assessment Roll

O&M	581,134.32
Debt	661,941.00
	<u>1,243,075.32</u>

Collections

96.11%

Note: \$1,243,073, \$581,132 and \$661,941 are 2024/2025 Budgeted assessments before discounts and fees.
\$1,170,139, \$546,264 and \$623,875 are 2024/2025 Budgeted assessments after discounts and fees.

\$ 1,194,781.39	
\$ -	\$ 1,147,759.59
\$ (558,560.14)	\$ (536,577.04)
\$ (636,221.25)	\$ (611,182.55)
\$ -	\$ -

DOUGLAS CARL HENRY

P 856-745-7038

E Dchenry05@gmail.com

A 14925 Blue Bay Circle
Ft. Myers, FL 33913

A 18444 WildBlue Blvd
Ft. Myers, FL 33913

OBJECTIVE

I am a full-time resident of Florida and the owner of two homes in the WildBlue/Vista community. I am interested in actively participating in the betterment of our community and helping to improve the infrastructure and amenities for all homeowners who have made investments here.

EXPERIENCE

2015 - Present

DC Henry, LLC- owner
Carpentry & Construction

2011-2015

RJ Miller Roofing

2004 – 2011

WJ Gross

Extensive experience in landscaping, hardscaping, carpentry & construction.

REFERENCES

[Available upon request.]

EDUCATION

Camden County College
(1993-1994)

Haddon Township High School
Haddon Township, NJ
(1989-1992)

Sean Clouse
14798 Blue Bay Circle
Fort Myers, FL 33913
913-963-1750

SeanClouse@Gmail.com / Sean@IQ.Software

QUALIFICATIONS

Forty years of professional experience including network management, large corporation and US Army construction project management, computer software design, development, implementation, and the founder of The IQ Group of Companies which has been in business for 26 years. Served as a Project Manager, Facilities Manager, Operations Manager, Business Process Consultant, and Sr Executive. Pioneered the IQ Coordinator business system to manage labor-oriented businesses, and Project Data Management service to improve project managers' quality of work and ability to centrally manage large projects.

A highly-organized, experienced and detail-oriented business consultant, who is a subject matter expert in the use of IQ Coordinator for project management and business operations. Demonstrates a proven record of success in leading businesses to higher operations efficiencies by streamlining business processes, and implementing systems to support small to mid-size companies. Possesses exceptional communication skills, the ability to comprehend and converge disparate disciplines, and utilize technology to support the unique requirements of vendors and customers.

PROFESSIONAL EXPERIENCE

THE IQ GROUP OF COMPANIES, INC. / Clearizon, Inc. Lenexa, Kansas

President / Consultant 1999 – Present

- Founded The IQ Group after developing the first fully internet-based intelligent labor estimation system.
- Project Manager over 300 consulting and database implementation engagements from 1999 to 2025.
- Directed product development, business process consulting, project management, system implementation, customer training and support.

PROJECT DATA MANAGERS, INC., Lenexa, Kansas

Owner / Project Manager, 2008 – 2016

- Pioneered Project Data Management and the business processes that support high-capacity project managers.
- Performed the Project Data Management Services for 57 projects ranging from new building construction FFE to DIACAP technology installation for the Army/PEO STRI and General Dynamics Information Technology, as well as provided Project Management oversight for the Dept of Labor OSHA Wichita KS.

SPRINT, INC., Gardner, Kansas

Facilities Manager / Project Manager / Network Systems Administrator 1988 - 1997

- Performed Facilities Project Management and Design for 48 buildings/6 States
- Network Systems Administration for the Central Office Engineering Work Order CAD System
- Project Manager for GPS Plant data collection and validation for 600 cities across 6 states.
- Managed the Engineering Work Order System, training engineers on the use of land-based engineering in MicroStation

SCOTT RICE OFFICE WORKS / SERVICE PLUS, INC., Kansas City, Missouri and Overland Park, Kansas

Project Manager / CAD Supervisor 1985-1988 - Services Director 1997 - 2000

- Supervised major account (Sprint) CAD efforts and electronic order entry.
- Project Manager on the AT&T Town Pavilion construction (34 Floors, 15 months)
- Established a customer retention service division that focused on providing professional services and project management to existing clients focusing on facilities management and commercial office space management as it related to office design, moves, adds and changes.

KNOWLEDGE & SKILLS

Project Management, IQ Coordinator Implementation, Business Process Analysis and Documentation, Relational Database Design, Software User Interface Design, Software Training/System Presentation, Technical Writing/Training Documentation, Labor Estimating, MS Excel, MS Word, MS PowerPoint, Training and Presentation, Adobe Photoshop, Quick Books Accounting

Terry J Vette
14175 Blue Bay Circle
Fort Myers, FL 33913
908-672-5780

PROFESSIONAL SUMMARY

Finance and accounting executive with over 40 years of experience driving financial reporting efficiency, global process improvements, and M&A integrations in Fortune 100 companies. Proven track record in leading multiple global system implementations, optimizing financial consolidation, and ensuring compliance within a highly regulated industry, resulting in enhanced reporting accuracy and operational excellence. Adept at collaborating with senior leadership, external auditors, and cross-functional teams to streamline processes and drive strategic financial decisions.

EXPERIENCE

Pfizer Inc., New York, NY

Divisional Controller, Pfizer Global Supply (Feb 2009 - Apr 2024)

- Led a regional team of Controllers overseeing 45 global manufacturing plants, ensuring compliance with financial policies.
- Provided consultation on US GAAP principles and Pfizer financial policies for global manufacturing sites.
- Monitored corporate restructuring programs, acquisitions, and divestitures of manufacturing plants worldwide.
- Reviewed and approved all SEC filings for the manufacturing division.

Senior Director, Consolidation Services (Jan 2003 - Jan 2009)

- Managed global financial data consolidation, ensuring timely and accurate financial reporting.
- Oversaw financial controls and SOX compliance within Consolidation Services.
- Collaborated with senior management and external reporting teams to improve financial transparency.

Pharmacia Corp., Peapack, NJ

Director, Global Sales & Financial Reporting (Dec 1998 - Dec 2002)

- Led financial data collection and reporting, ensuring high data integrity and functionality for internal and external stakeholders.
- Managed the Financial Consolidation & Global Sales Reporting team, overseeing system design and implementation.

Corporate and Public Accounting Roles (Oct 1982 - Dec 1998)

- Multiple Public Accounting roles with increasing responsibilities.
- Led financial system implementation and process improvements to drive efficiencies.

EDUCATION

Western Michigan University, Kalamazoo, MI

- Master of Business Administration, Finance (Jan 1988 - Dec 1991)
 - Bachelor of Business Administration, Accounting (Sept 1978 - June 1982)
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This is Scott Morrison. I am a resident of Vista Blue. My address is 13999 Blue Bay Circle.

My wife Lynn and I have lived in SW Florida since 2002, initially in Cape Coral. We moved here from metro-Milwaukee Wisconsin area.

I owned a contracting company in Wisconsin with my brother for 20 years. After selling the business I move to Cape Coral Florida, and lived there until 2015.

Since then we lived in Town & River off McGregor Blvd for a couple years, and after that in Hampton Park in Gateway (originally a WCI development). We moved into our home in Vista in March of 2023.

I am an active real estate broker with my own brokerage Premier Tropical Realty, LLC, and have sold many homes in Wildblue and Vista. I actually have a dedicated WildBlue website: www.wildbluelakehomes.com. I and I am in the process of updating that website now that all new homes have been sold. I list and sell homes primarily in Lee County, and belong to the local Board of Realtors.

Feel free to contact me with any questions.

Regards,
Scott

Scott R. Morrison
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Premier Tropical Realty

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