TRI-PAR PARK & RECREATION DISTRICT

1616 Presidio Street, Sarasota Florida 34234

Phone: 941-355-8747 Fax: 941-360-0060

Goals, Objectives and Performance Measures/Standards Annual Reporting Form

October 1, 2026 – September 30, 2027

Overview of District:

Tri-Par Estates Park & Recreation District, or The District, is a 55+ special district created under House Bill No, 1857 dated May 25, 2001, establishing and governing the operation of the District located in Sarasota Florida. The Tri-Par Park District provides local government services and maintains the public infrastructure for an area of approximately 144 acres of land that is located entirely within Sarasota County. As a special unit of government, Tri-par assesses its own taxes to support the planning, financing, operating and maintaining of its various community facilities within its jurisdiction which includes a recreation hall, 12-foot-deep swimming pool, Clubhouse and associated facilities. There are a total of 872 residential units consisting of single family manufactured homes. The community also includes a putt-putt golf course, horse shoes facility, pickleball and shuffleboard courts.

The District is governed by a 9-member elected Board of Trustees. Three Trustees are elected every year for a 3-year term. The Board is elected and responsible for actions to manage the District.

In addition, the Board enlists a group of professionals to support the needs of the District:

- District Management: A part-time Park Manager, Administrative Assistant and Accountant handle the financial, administrative and day-to-day needs of the District.
- District Counsel: The District Counsel handles the legal needs of the District.
- Maintenance: Three part-time Maintenance Staff handle the day-to-day operations of the facilities within the district.

Contact information for the Trustees and staff can be found on the Tri-Par Estates website: www.triparestates.com

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Tri-Par Estates Park & Recreation District has established the following goals, objectives and performance measures/standards for the Fiscal Year 2027:

1. Community Communication and Engagement

Goal 1.1: Public Meetings Compliance

- **Objective:** Hold at least 10 regular Board of Trustees meetings per year to conduct district-related business and discuss community needs. Regular meetings are open to the public and agendas will include time for the public to make comments.
- **Measurement:** Number of public Board meetings held annually as evidenced by meeting minutes and legal advertisements.
- **Standard:** A minimum of 10 Board meetings were held during the Fiscal Year.
- **Achieved:** Yes ☐ No ☐

Goal 1.2: Notice of Meetings Compliance

- **Objective:** Provide public notice of each non-emergency meeting at least seven days in advance, and/or notice of annual meeting schedule. Notice to be shared on the District website and published in the district newsletter.
- **Measurement:** Timeliness and method of meeting notices as evidenced by posting to District website and published in the district newsletter.
- **Standard:** 100% of non-emergency meetings were advertised with seven days' notice per statute or by annual notice of meeting schedule via newsletter and on district website.
- **Achieved:** Yes ☐ No ☐

Goal 1.3: Website Public Records

- **Objective:** Ensure that meeting minutes, agendas, and other statutorily-required district records are readily available and easily accessible to the public by regularly updating the district website.
- **Measurement:** Regular website reviews will be completed to ensure meeting minutes and other public records are up to date as evidenced by Park Management's records. Website reviews will also include running an ADA compliance report on all pages of the website.
- **Standard:** 100% of quarterly website checks were completed by District Management.
- **Achieved:** October ☐ January ☐ April ☐ July ☐

2. Infrastructure and Facilities Maintenance

Goal 2.1: District Infrastructure

- **Objective:** Maintenance Staff will conduct an annual inspection per year of all the district infrastructure including the park facilities and infrastructure to ensure area is maintained and operating as designed and will make periodic reviews throughout the year of any concerns or noted deficiency.
- **Measurement:** An annual inspection completed as evidenced by the staff related to district infrastructure
- **Standard:** 100 % of requested inspections were completed in the Fiscal Year by the maintenance staff.
- **Achieved:** Yes ☐ No ☐

Goal 2.2: District Inspections

- **Objective:** District Manager and or Trustees will conduct regular inspections of the homes in the park to ensure they are well maintained and followed the park policies and procedures.
- **Measurement:** 100% of required inspections completed per year as evidenced by Tri-Par Maintenance Vendor's service reports. The approved Southwest Florida Water Management District permit requires that the storm water systems are reviewed to ensure they are working as designed This re-certification is due every five years.
- **Standard:** Minimum of four maintenance/treatment events were completed in the Fiscal Year by the Tri-Par's Maintenance Vendor.
- **Achieved:** Yes ☐ No ☐

Goal 2.3: District Storm Water System Maintenance

- **Objective:** District Manager and or Trustee will conduct at least 10 visual inspections per year of the Tri-Par's stormwater system to ensure system is maintained and operating as designed. Park Manager to recommend further inspection, cleaning or repairs as needed.
- **Measurement:** A minimum of 10 visual inspections completed per year as evidenced by Park Manager's report related to Tri-Par's stormwater system.
- **Standard:** 100% of requested visual inspections were completed in the Fiscal Year by Tri-Par's Park Manager.
- **Achieved:** Yes ☐ No ☐

Goal 2.4: District Landscaping, Lighting and irrigation

- **Objective:** Park Staff performs landscaping and conducts at least six visual inspections per year of the Park's landscaping, lighting, and facilities to ensure grounds and buildings are maintained and operating as designed. Maintenance Supervisor to recommend further inspection or repairs as needed.
- **Measurement:** A minimum of six visual inspections completed per year as evidenced by Park Manager's report related to Tri-Par's owned common grounds.
- **Standard:** 100% of required visual inspections were completed in the Fiscal Year.
- **Achieved:** Yes ☐ No ☐

3. Financial Transparency and Accountability

Goal 3.1: Annual Budget Preparation

- **Objective:** Prepare and approve the annual proposed budget as set by section 5.44 of the Tri-Par Policy and Procedures.
- **Measurement:** Proposed budget was approved by the Board before April 30th, and final budget was adopted as evidenced by meeting minutes. Budget documents listed on Tri-Par Park website within Districts records and sent to the County at least 60 days prior to the public hearings.
- **Standard:** 100% of budget approval and adoption were completed by the statutory deadlines, posted to the Tri-Par website, and sent to the County at least 60 days prior to the public hearings.
- **Achieved:** Yes ☐ No ☐

Goal 3.2: Annual Financial Audit

- **Objective:** Conduct an annual independent financial audit per statutory requirements and publish the results to the Tri-Par 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 Tri-Par 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 Tri-Par website and transmitted to the State of Florida.
- **Achieved:** Yes ☐ No ☐

Goal 3.3: Assessments Notification

- **Objective:** Notification of annual assessments mailed to residents and posted to the Tri-Par website after adoption of annual budget.
- **Measurement:** Budget review performed by staff stating need for annual assessment, showing capital needs and with comparison for prior year's annual assessment values is available on the Tri-Par website.
- **Standard:** Assessment values to be accessible on Tri-Par website within 30 days of adoption of annual budget.
- **Achieved:** Yes ☐ No ☐

4. Board of Trustees Annual Requirements

Goal 4.1: 4 Hours of Annual Ethics Training for Trustees

- **Objective:** Board of Trustees to take four hours of ethics training classes annually.
- **Measurement:** Self-report of course work, certificate, and dates of courses recorded by each Trustee.
- **Standard:** All nine Trustees to complete two (2) hours of Ethics Law, one (1) hour of Sunshine Law and one (1) hour of Public Records Law training classes. Training is reportable on the e-filing of the annual Form 1 in the following fiscal year.
- **Achieved:** Yes ☐ No ☐

Goal 4.2: Form 1 and Form 1F Statement of Financial Interests

- **Objective:** Each Trustee to complete the annual Form 1 and/or Form 1F when leaving office, within statutorily required time.
- **Measurement:** Appearance by July 1 on the Ethics Disclosure website.
- **Standard:** Form 1 to be completed within 60 days of the first day of office, if not completed during candidate qualifying period, and Form 1F within 60 days of leaving office.
- **Achieved:** Yes ☐ No ☐