

**MINUTES OF BUDGET WORKSHOP
HERITAGE OAK PARK
COMMUNITY DEVELOPMENT DISTRICT**

A Budget Workshop of the Board of Supervisors of the Heritage Oak Park Community Development District was held Thursday, April 16, 2026, and called to order at 9:00 a.m., at 19520 Heritage Oak Boulevard, Port Charlotte, Florida 33948, but recessed until 9:30 a.m., due to an error on the Community Calendar.

Present either in person or via electronic communications were:

Paul Falduto, Jr.	Chairperson
Stephen Horsman	Vice Chairperson
Jeanne Teter	Assistant Secretary
Carmen Russo	Assistant Secretary
Vincent Scotto	Assistant Secretary
Michelle Egan	District Manager/Project Manager
Andrew Cohen	District Counsel
Terri Lusk	District Accountant (via Teams)
Hanna Yi	Inframark Accountant (via Teams)
Audience Members	

This is not a certified or verbatim transcript but rather represents the context and summary of the budget workshop. The full budget workshop is available in audio format upon request. Contact the District Office for any related costs for an audio copy.

FIRST ORDER OF BUSINESS

Call to Order and Roll Call

Mr. Falduto called the Budget Workshop to order, and Ms. Egan called the roll.

SECOND ORDER OF BUSINESS

Pledge of Allegiance

The Pledge of Allegiance was recited.

THIRD ORDER OF BUSINESS

**Discussion of the Fiscal Year 2027
Proposed Budget**

This workshop was to discuss the Operating and Maintenance portion of the budget. Ms. Egan announced that Ms. Terri Lusk, the District Accountant, will be retiring at the end of the month, and the new District Accountant, Ms. Hanna Yi will be joining the team. Ms. Yi was introduced and welcomed.

Ms. Egan went over each section of the O&M portion of the budget. She explained that currently there is an increase in the assessment of \$75.00. The increase includes all contract increases as well as an increase for CDD employees (\$1/hour for the District/Project Manager &

Heritage Oak Park CDD
April 16, 2026 Budget Workshop

Activities Coordinator and \$2/hour increase for the CDD Maintenance Technician). The Board had no questions at this time. Ms. Egan will email the updated proposed budget to all Board members and will also post it on the District's website.

FOURTH ORDER OF BUSINESS

The workshop was adjourned at 9:53 a.m.

Adjournment


Chairperson/Vice Chairperson