



2525 Bobcat Village Center Road Unit #105 North Port, FL 34288 Tom Iarossi, VP Commercial Office: (813) 288-0068 Cell: (813) 436-6521 tiarossi@whartonsmith.com

Caryn Huff, Project Executive Office: (941) 621-4723 Cell: (813) 240-4165 chuff@whartonsmith.com

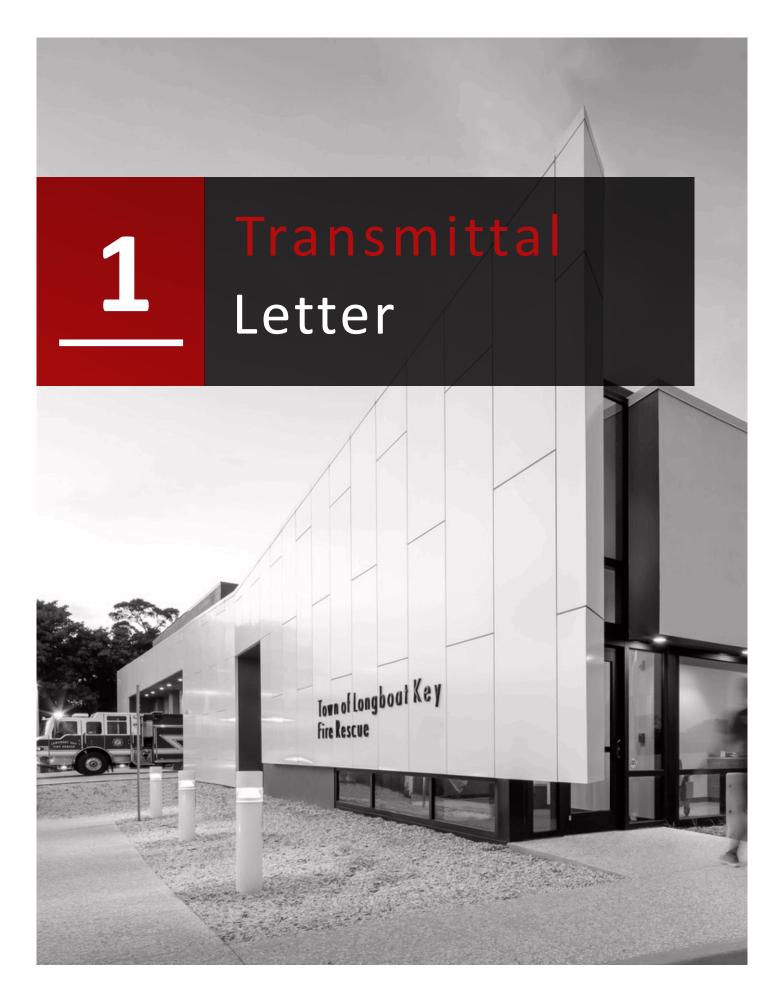


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City of North Port | Finance Department- Purchasing Division Keith Raney, Contract Administrator II 4970 City Hall, 3 RD Floor, Suite 337, North Port, Florida 34286 November 3, 2022

Re: RFP No. 2023-07 Fire Station No. 81 Expansion and Remodel – Construction Manager (CM) at Risk

Dear Members of the Selection Committee:

Wharton-Smith is excited about the opportunity to continue our relationship with the City of North Port in serving as your Construction Manager for the Fire Station No. 81 Expansion and Remodel project. Our team is well versed in the CM at Risk process and is eager to deliver a successful, high-quality project to the City. We have assembled an experienced, local team with an excellent track record in successful Public Safety projects. Our team brings the following key advantages to the Fire Station No. 81 Expansion and Remodel project:

LOCAL TEAM — Our proposed team of Caryn Huff, LEED AP, Doug Whisler, John Carlson, Jay Coker, and Mike Schreiber have proudly worked together on many projects within the region. As a result, this team's knowledge of the area, the standards and requirements of local governing authorities, permitting agencies and building standards will be a direct benefit to the project. With this experienced local team, no time or money will be wasted on learning curves. Our team will hit the ground running on day one, which will safeguard the schedule against unexpected delays and support an early or ontime delivery to generate savings back to the City. Through our local office, we have the ability to extend our management and supervision skills to the Fire Station No. 81 project, allowing for additional cost savings to the City since we are less than 5 miles from the project site! No added costs for travel or lodging will be required.

PUBLIC SAFETY EXPERIENCE — Our team brings a strong depth of experience with Public Safety projects throughout the state of Florida. Over 95 percent of Wharton-Smith's work is performed for clients in the public sector, including work for over 80 counties, towns, and cities statewide. We also have a long track record of working with SchenkelShultz and have completed 18 projects with them in the past! Many of these have been Public Safety projects.

COMMITMENT TO THE CITY OF NORTH PORT – To demonstrate our commitment to the

City of North Port, we established a regional office in the city last year. We are thrilled to be part of such a dynamic and growing community and plan to be a business partner of the city for many years to come! Our local office is staffed with nearly 20 construction professionals that have the credentials and knowledge required to collaborate with your team throughout the preconstruction process. There is no better example of this than with our recent effort

on the North Port Fire Training Tower project, in which our team was able to carefully manage the budget and implement a number of cost saving ideas that have kept the project under budget. Even in an unprecedented construction market, our team has leveraged local relationships to build the most efficient and economical project for the city. With our team, it is not just about crossing the finish line, but rather, fostering a collaborative environment throughout the entire construction process.

We look forward to being considered as your construction management team for this venture and are fully committed to making the project a success in every way. We appreciate the opportunity to submit our proposal and look forward to discussing the project in greater detail in the near future.

Declaration: This proposal is made without collusion with any other person or entity submitting

a proposal pursuant to this RFP.

Sincerely,

Wharton-Smith. Inc.

Tom Iarossi Vice President, Commercial Division 813-436-6521

Wharton-Smith, Inc.

tiarossi@whartonsmith.com

Caryn E. Huff Project Executive 813-240-4165 chuff@whartonsmith.com

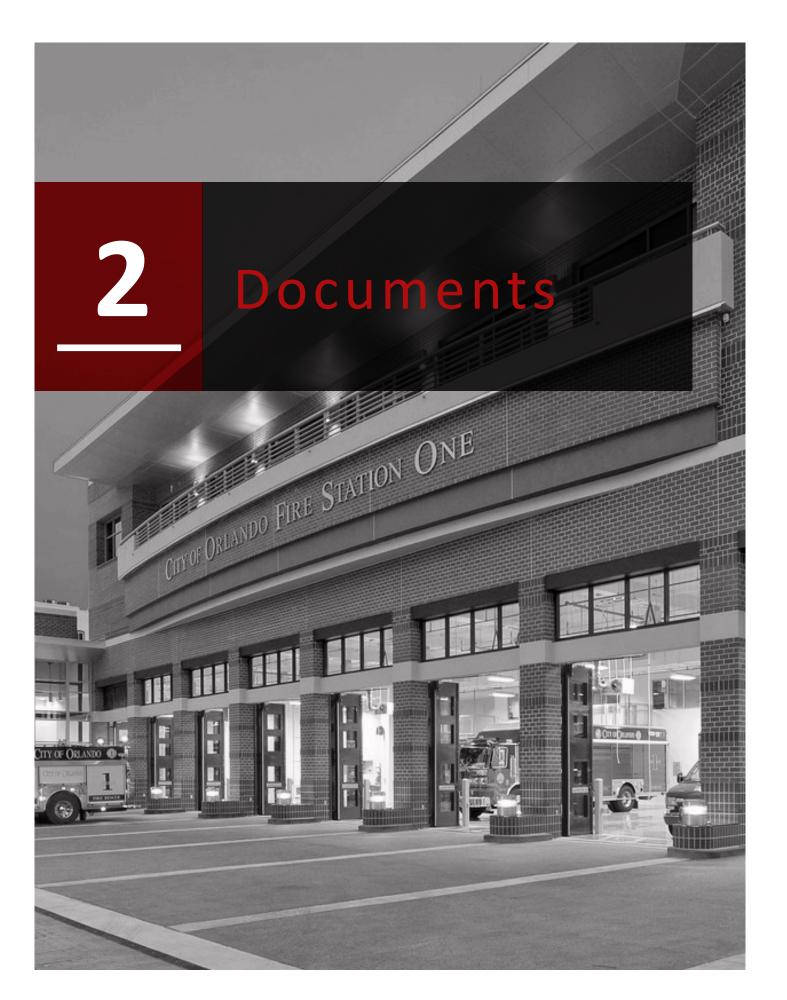


IN CMAR

CLIENTS

1.283+ **PROJECTS FOR**

MUNICIPAL CLIENTS





Licenses and Certifications

State of Florida Department of State

I certify from the records of this office that WHARTON-SMITH, INC. is a corporation organized under the laws of the State of Florida, filed on April 3, 1984, effective April 2, 1984.

The document number of this corporation is G94383.

I further certify that said corporation has paid all fees due this office through December 31, 2022, that its most recent annual report/uniform business report was filed on January 4, 2022, and that its status is active

I further certify that said corporation has not filed Articles of Dissolution.

Given under my hand and the Great Seal of the State of Florida at Tallahassee, the Capital, this the Fourth day of January, 2022



mber: 7328199655CC

To authenticate this certificate, visit the following site, enter this number, and then

https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication

CITY OF NORTH PORT

BUSINESS TAX RECEIPT Valid Thru September 30, 2023

WHARTON-SMITH INC (OL) 2525 BOBCAT VILLAGE CENTER RD

NORTH PORT FL 34288

TIMOTHY SMITH 2525 BOBCAT VILLAGE CENTER RD 105 NORTH PORT FL 34288

issue Date: September 13, 2021

This Business Tax Receipt is hereby issued for the occupation of SERVICE GENERAL. The Business Tax Receipt Number is 23-00021319 and is valid with the City of North Port at 4970City Hall Blvd. North Port, FL 34286.

COMMENTS: CONSTRUCTION RESTRICTIONS:

The person, firm or corporation named above is granted this Business Tax Receipt to the provision of Chapter 34 of the North Port Code of Ordinances. Issuance of this tax receipt is not an endorsement, or certification of compliance with other ordinances or laws. This tax receipt does not assure quality of work or confirm that regulatory or zoning

requirements have been met. Holder must comply with all city ordinances and state codes.

This Business Tax Receipt must be exhibited conspicuously at your place of business.









CARYN HUFF, CGC, LEED AP

Project Executive

EDUCATION

BS, Building Construction, **Auburn University**

EXPERIENCE

30 - Industry

5 - Wharton-Smith

CERTIFICATIONS & AFFILIATIONS

- General Contractor State of Florida #CGC1530053
- LEED Accredited Professional
- Solar Contractor State of Florida
- Charlotte- Desoto Building Industry Association, Immediate Past President
- Professional Women in Building Council
- North Port Chamber, Economic **Development Committee**
- CPR/First Aid

ABOUT ME

As Project Executive, Caryn is responsible for ensuring projects are completed on time and to the client's satisfaction and for providing executive guidance and problem-solving advice to project managers and superintendents. She assists in staffing, outlining project plans, setting project goals/deadlines, and evaluating performance.

RELATED PROJECT EXPERIENCE

Town of Longboat Key, FL, Fire Stations #91 & #92—\$6,000,000

This project consisted of an extensive renovation effort to the existing Station #91 while occupied, and the tear down and new construction of Station #92. The services for interior modification for Station #91 include kitchen, fitness space, restrooms, storage, decontamination room, and standby power. Station #92 consisted of demolition to the existing building with the new fire station being built on the same property. The new station is a one-story three-bay building. The existing fire department staff was housed on site in a modular fire station. Construction had to be coordinated around staff on site to allow construction to progress.

Fire Station #2, Charlotte County (Port Charlotte, FL)—\$5.5M

Wharton-Smith provided construction management at risk services for Charlotte County on the new Fire Station #2. This new 12,727 SF fire station consists of 12 bunk rooms and 3 apparatus bays equipped with office space, a kitchen, living, fitness, and decontamination areas. This project contains fuel pumps and associated parking for Fire/EMS vehicles.

Fire Station #5, Charlotte County (Punta Gorda, FL)—\$4.5M

Wharton-Smith provided construction management at risk services for Charlotte County on the new Fire Station #5. This new 9,621 SF fire station consists of 8 bunk rooms and 2 apparatus bays. The station is equipped with office space, a kitchen, living, fitness, and decontamination areas.

Charlotte County, FL, Fire Station #9 Temporary Facility—\$200,000

This project is a modular building that contains 3 bunk rooms, bunker gear storage, a decon room, and living facilities to temporarily house Fire/EMS staff in the Babcock Ranch community.

Charlotte County, FL, Airport Rescue Fire Fighter Training Facility (ARFF)— \$9,200,000

Wharton-Smith provided Construction Management services for the Airport Rescue and Fire Fighter (ARFF) Training Simulator Facility, a unique project to help train fire fighters in the event of an aircraft emergency. The 737 aircraft, constructed of weathering steel, sits adjacent to an existing fire training tower that will enable fire fighters from all over the country to experience real life scenarios related to aircraft disasters.

28 Years LOCAL Experience!







DOUG WHISLER

Area Superintendent

EXPERIENCE

40 - Industry 6 - Wharton-Smith

REGISTRATIONS/ CERTIFICATIONS

- OSHA 30-Hour
- First Aid & CPR Certified
- Confined Space
- Fall Protection
- Scaffolding
- Trenching & Excavation
- Forklift Operator

ABOUT ME

As Area Superintendent, Doug will assist with safety inspections, daily reports, three-week look ahead schedules, delivery coordination, production planning, weekly subcontractor coordination meetings, storage and installation requirements, quality control, labor and equipment resources, project final quality, start-up testing, as well as final close-out

RELATED PROJECT EXPERIENCE

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Charlotte County, FL, Airport Rescue Fire Fighter Training Facility (ARFF)— \$9,200,000

Wharton-Smith provided Construction Management services for this unique project to help train fire fighters in the event of an aircraft emergency. The 737 aircraft, constructed of weathering steel, sits adjacent to an existing fire training tower that will enable fire fighters from all over the country to experience real life scenarios related to aircraft disasters.

City of North Port, FL, Fire Training Tower—\$1.4 M

Wharton-Smith is currently providing Construction Management services for the construction of a Mobile Fire Training Unit consisting of a Class A training tower with an approximate size of 8,000 SF for the entire structure. Doug is serving as the Area Superintendent on this project.







JAY **COKER**

Superintendent

EXPERIENCE

41 - Industry

4 - Wharton-Smith

REGISTRATIONS/ CERTIFICATIONS

- Fall Protection
- Trenching & Excavation
- Scaffolding
- Confined Space
- Trenching & Excavation
- CPR/First Aid

ABOUT ME

As Superintendent, Jay is responsible for supervision of all field activities, including the coordination of all subcontractors and field construction activities and supervisory review of all on-site construction. In addition, Jay oversees and implements safety procedures and accident protection and prevention.

RELATED PROJECT EXPERIENCE

Fire Station #2, Charlotte County (Port Charlotte, FL)—\$5.5M

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Fire Station #5, Charlotte County (Punta Gorda, FL)—\$4.5M

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Fire Station #9 Temporary Facility, Charlotte County (Babcock Ranch, FL)— \$200,000

This project is a modular building that contains 3 bunk rooms, bunker gear storage, a decon room, and living facilities to temporarily house Fire/EMS staff in the Babcock Ranch community.

Community Development Center Office Expansion, Charlotte County (Port Charlotte, FL)—\$2.5M

Wharton-Smith provided Construction Management services on the Community Development Office Expansion project. Phase 1 consisted of constructing a new concrete block and stucco 5,000 SF addition onto the Community Development building. Phase 2 consisted of interior renovations to the existing 17,931 SF Community Development building. Managing the end users to maintain the project schedule while keeping the building operational during construction proved to be a challenge for the team. To solve this, Wharton-Smith's team facilitated end user scope and scheduling meetings that allowed the team to keep the project on task as required per the contract.



Charlotte County - Fire Station #2







JOHN CARLSON, cgc

Senior Project Manager

EDUCATION

BS, Building Construction, University of Florida

AA in Building Construction, Santa Fe College

EXPERIENCE

17 - Industry

2 - Wharton-Smith

REGISTRATIONS/ CERTIFICATIONS

- Certified General Contractor-State of Florida, CGC1523256
- OSHA 30-Hour
- CPR/First Aid
- Trenching & Excavation
- Confined Space
- Fall Protection
- Scaffold Safety

ABOUT ME

As Senior Project Manager, John is responsible for providing daily leadership to the project team and for the successful completion of all preconstruction and construction phases of the project. He will develop schedules, perform constructability reviews, value engineering and site logistics. During construction, he assists with all construction activities, including quality control, cost control, change orders, and close-out.

COMMITTED TO THE LOCAL COMMUNITY

John has served in several volunteer roles within the local community. Currently, John is serving as Vice President for Future Builders of America and the Chair of the Government Affairs committee for the Florida Home Builders Association. He has served on both boards for over 10 years. In addition, he is a member of the Charlotte-Desoto Building Industry Association and a board member of the Manatee-Sarasota Building Industry Association. John's extensive local relationships and familiarity with the area will prove to be an invaluable asset to this project!

RELATED PROJECT EXPERIENCE

Fire Station #2, Charlotte County (Port Charlotte, FL)—\$5.5M

Wharton-Smith provided construction management at risk services for Charlotte County on the new Fire Station #2. This new 12,727 SF fire station consists of 12 bunk rooms and 3 apparatus bays equipped with office space, a kitchen, living, fitness, and decontamination areas. This project contains fuel pumps and associated parking for Fire/EMS vehicles.

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Charlotte County - Fire Station #5







MIKE SCHREIBER

Project Engineer

EDUCATION

AS, Drafting & Design Technology, Edison State College

Florida Southwestern State College:

AS, Civil Engineering Technology

AS, Architectural Design & Construction Technology

AS. General Studies

AS, Computer Programming & **Analysis**

EXPERIENCE

- 1 Industry
- 1 Wharton-Smith

CERTIFICATIONS & AFFILIATIONS

- Confined Spaces
- Trenching & Excavation
- Scaffolding
- Fall Protection

ABOUT ME

As Project Engineer, Mike is responsible for facilitating subcontractor meetings, creating and distributing weekly owner and subcontractor meeting minutes, completing submittal reviews for compliance, facilitating MEP coordination meetings, communicating directly with the project architect, compiling operations/maintenance manuals, coordinating and tracking material deliveries, and taking weekly progress photos.

RELATED PROJECT EXPERIENCE

Fire Station #2, Charlotte County (Port Charlotte, FL)—\$5.5M

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City of North Port, FL, Fire Training Tower—\$1.4 M

Wharton-Smith is currently providing Construction Management services for the construction of a Mobile Fire Training Unit consisting of a Class A training tower with an approximate size of 8,000 SF for the entire structure. Mike is serving as the Project Engineer on this project.

City of Cape Coral, Southwest Water Reclamation Facility Operations Building-\$15.7 M

Wharton-Smith is constructing a 25,000 SF new administration facility with two stories and a mezzanine, utilizing tilt wall construction. This building is designed to create state of the art office spaces for staff and a permanent structure for the plant's computer systems, in lieu of a temporary modular trailer. The facility will include open areas for maintenance purposes, and conference room areas. Additionally, we are building a 500 SF Pre-Engineered Metal Building for warehouse type storage.









JUANMIGUEL GORUT, LEED AP

Senior Preconstruction Services Manager

EDUCATION

BS, Mechanical Engineering, University of Florida

MBA, Global Management, University of Phoenix

EXPERIENCE

17 - Industry

5 - Wharton-Smith

CERTIFICATIONS & AFFILIATIONS

- General Contractor State of Florida (Inactive)
- LEED Accredited Professional

ABOUT ME

As Sr. Preconstruction Manager, Juanmiguel will serve as the project communication point man and will coordinate preconstruction activities between our key personnel, the design team, and client representatives. He will be an active participant in the preconstruction efforts assisting with constructability reviews, subcontractor bid package preparation, scheduling, and cost analysis. He will ensure that teamwork, effective communication, and timely responsiveness among the entire team is achieved at the highest level.

RELATED PROJECT EXPERIENCE

Town of Longboat Key, FL, Fire Stations #91 & #92—\$6,000,000

This project consisted of an extensive renovation effort to the existing Station #91 while occupied, and the tear down and new construction of Station #92. The services for interior modification for Station #91 include kitchen, fitness space, restrooms, storage, decontamination room, and standby power. Station #92 consisted of demolition to the existing building with the new fire station being built on the same property. The new station is a one-story three-bay building. The existing fire department staff was housed on site in a modular fire station. Construction had to be coordinated around staff on site to allow construction to progress.

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Temporary Fire Station #9, Charlotte County (Babcock Ranch, FL)—\$200k This project is a modular building that contains 3 bunk rooms, bunker gear storage, a decon room, and living facilities to temporarily house Fire/EMS staff in the Babcock Ranch community.

Airport Rescue Fire Fighter Training Facility (ARFF), Charlotte County (Punta Gorda, FL)-\$9.2M

Wharton-Smith provided construction management at risk services for Charlotte County's Airport Rescue Fire Fighter Training Facility (ARFF). A unique project to help train firefighters in the event of an aircraft emergency, the 737 aircraft, constructed of steel, sits adjacent to an existing fire training tower that enables firefighters from all over the country to experience lifelike scenarios dealing with aircraft disasters.





About Wharton-Smith

We are certainly not new to performing construction management services for municipal clients—this is what we do! As a leading construction management builder throughout the Southeast, Wharton-Smith is enthusiastic to present our qualifications, which is to deliver top notch construction management services to the City of North Port. It is our goal to exceed your expectations on this project, by providing a local and experienced team. Allow us to introduce ourselves:

Founded by George Smith and Bill Wharton in 1984, Wharton-Smith is a privately held corporation founded on strong work ethics and the vision to create a positive impact within the communities we serve. We continue to uphold these founding ideals under the current leadership of Tim Smith, President, and as a result, the firm has built a solid reputation throughout the Southeastern United States. Wharton-Smith is a 38-year-old construction management firm with Florida branch offices in North Port, Fort Myers, Pensacola, Rockledge, Tampa, Sanford, and Jupiter. Our company now employs 686 diversely qualified personnel consisting of construction managers, project estimators, project superintendents, engineers, construction specialists, and administrative personnel.

CMAR Experts

harton-Smith specializes in providing Construction Management at Risk (CMAR) services for public construction projects and a multitude of different market segments. Wharton-Smith also performs a substantial amount of work with our own forces. As the construction manager (CM), Wharton-Smith will lead the project, providing singlesource responsibility to the City of North Port. We know that as the CM, we will be responsible for providing technical expertise and professional services for all management aspects of the project, including coordination with the City, project stakeholders, the building official, and inspectors.



FIRE STATION EXPERIENCE

As a construction management firm with vast experience in fire station construction, Wharton-Smith has the knowledge and expertise to successfully complete this project. Over the last 15 years, Wharton-Smith has constructed more than 30 fire station projects, ranging from one-bay structures to multimillion-dollar, state-of-the-art rescue facilities. Our team fully understands the requirements and key elements that are unique to this project equating to a seamless delivery and worry-free project for the City of North Port.

Osceola County Fire Station 55 Osceola County Fire Station 64 Osceola County Fire Station 62 City of Largo Fire Station 39 City of St. Cloud Fire Station 31 City of Kissimmee Fire Station 11 City of Maitland Fire Station 45 City of Ocoee Fire Station 1 City of Sanford Public Safety Complex City of Tavares Public Safety Complex

City of Mount Dora Fire Station 34 City of Mount Dora Fire Station 35 City of Orlando Fire Station 1 Orange County Fire Station 33 Orange County Fire Station 35 Orange County Fire Station 43 Orange County Fire Station 55 Orange County Fire Station 56 Orange County Fire Station 63 Orange County Fire Station 70

Orange County Fire Station 77 Orange County Fire Station 81 Orange County Fire Station 85 Osceola County Fire Station 54 Charlotte County Fire Station 2 Charlotte County Fire Station 5 Charlotte County ARFF Charlotte County Fire Station 9 Longboat Key Fire Station 91 Longboat Key Fire Station 92





ORGANIZATIONAL CHART



Johnnie Lohrum Project Architect



City of North Port & North Port Fire Rescue



Caryn Huff Project Executive



John Carlson Sr. Project Manager



Doug Whisler Area Superintendent



Jay Coker Superintendent



Mike Schreiber Project Engineer

KEY PERSONNEL ASSIGNED

Wharton-Smith is a full-service firm in that we have an in-house estimating department, a corporate scheduler, a corporate safety officer, and a BIM/VDC department if elected for use on this project. Beyond our normal breadth of services, you can expect a hands on, collaborative approach between the City of North Port, project stakeholder's and the design team throughout the project, and an open-book, team-oriented approach during construction and closeout as well.

The team we have assembled for the Fire Station No. 81 Expansion and Remodel project was thoughtfully constructed to offer the greatest benefit to the City. As you will see, our team offers the skills, experience, and in-depth knowledge necessary to successfully construct the project within the City's schedule, budget, and expectation of long-term quality.

Your project will be managed by our **North Port office located at 2525 Bobcat Village Center Road**. All work will be performed out of an onsite job trailer with project oversight provided by our local team. Our public safety experts, Caryn Huff and Doug Whisler will be overseeing all construction activities with John as the Sr. Project Manager and Jay as the day-to-day superintendent on site. Our team members will be readily available to serve the City of North Port!

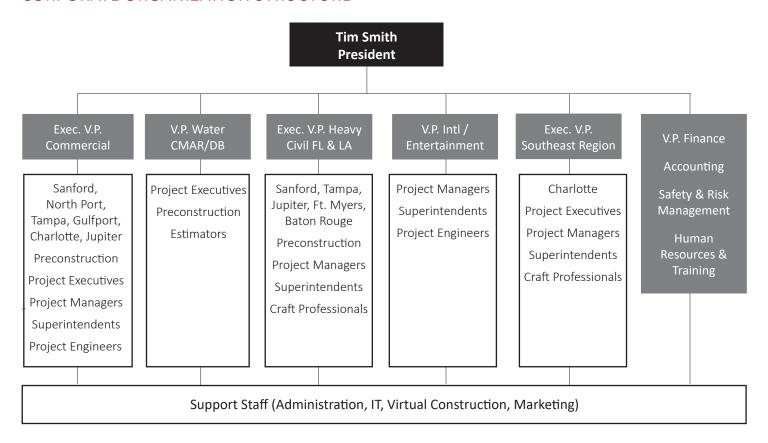
TEAM SYNERGY

Over the last 14 years, Wharton-Smith and SchenkelShultz have worked together on 18 projects. We are currently working with SchenkelShultz on the Charlotte County Sheriff's Administrative Complex & 911 Facility and the Charlotte County District 4 Headquarters and Training Facility. This extensive experience means we bring an established, trusted relationship with your selected Architect enabling us to hit the ground running on your Fire Station 81 Expansion and Remodel project.





CORPORATE ORGANIZATION STRUCTURE

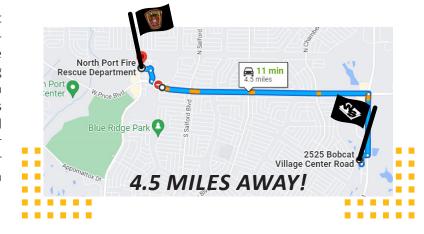


LOCATION, LOCATION, LOCATION!

Your project will be managed by our North Port office located in Sarasota County at 2525 Bobcat Village Center Road, North Port, FL, 34288, *just 4.5 miles from Fire Station No. 81!*

We pride ourselves on supporting the local economy and the communities in which we live and work. As good stewards of the City's tax dollars, we will make every effort to hire local subcontractors. Many of our subcontractors are located in Sarasota, Venice, **North Port**, and Port Charlotte.

One of the benefits of hiring Wharton-Smith is that we are located in the City of North Port. But, if inperson meetings are not feasible, our staff has the training and ability to utilize multiple virtual meeting platforms as another means of communication with subcontractors and project stakeholders. This method of communication has been implemented on our projects to ensure safety and convenience for project team members. In addition to email and other standard means of communication, it also provides a way to transfer information quickly and efficiently.







Project Approach

The Wharton-Smith Team has a well-developed comprehensive project approach for contracts using the Construction Management (CM) methodology, similar to what will be required for the Fire Station No. 81 Expansion and Remodel project. Our proactive approach guarantees effective project leadership from the very beginning of the project delivery and is enhanced by our emphasis on communication, preplanning, and ability to understand your processes, constraints, and needs. Our Project Executive, Caryn Huff will provide executive level oversight for all construction management services. Senior Project Manager, John Carlson will provide technical expertise and oversee the management of the project, both for preconstruction and construction, including coordination with the City of North Port, end users, design consultants, utility companies, permitting agencies, and any other authorities having jurisdiction.

Continuous evaluation of the project scope and budget while maintaining a close interface with the City of North Port and the project team is integral to our approach and key to the project's success. In doing so, we also guarantee a continued commitment to quality for the duration of the project by following a written set of project management and production procedures to aid and guide our team members. The key to a successful construction project is to understand the Owner's program, as well as any forces that affect that program as early in the project as possible. It is critical that the team establishes clear communications and a close working relationship at the onset, from which decisions regarding design, cost, schedule, and constructability flow.

SERVICES TO BE PROVIDED

For the Fire Station No. 81 Expansion and Remodel project, Wharton-Smith will perform four important services:

- **Preconstruction Services**
- **Construction Services**
- **Overall Project Management/Process** Management
- Post Construction/Warranty Management



PROJECT UNDERSTANDING

We have studied your existing site, building plans and other RFP documents. Below is our understanding of the project scope:

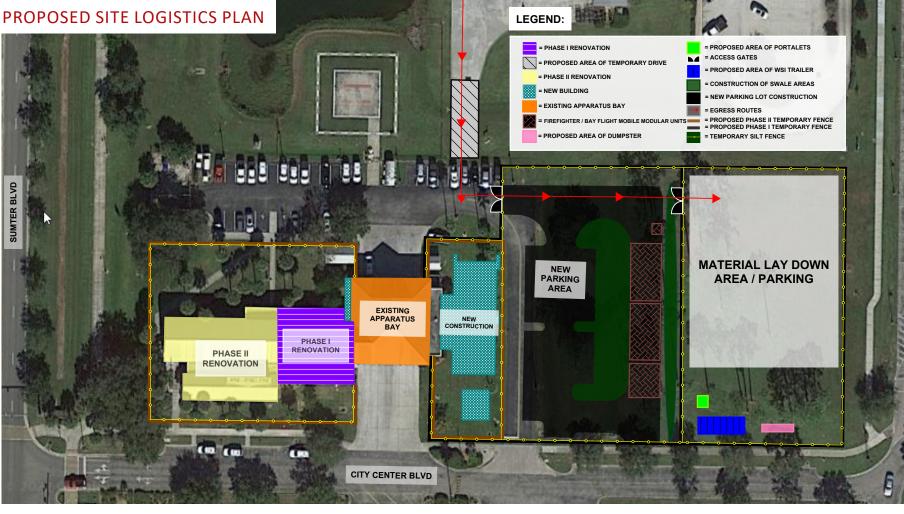
- Construct new addition approx. 5,428 SF
- Renovate interior of existing 9,210 SF Fire Station
- Perform sitework, construct new parking lot and stormwater area
- Install modular facility and temporarily relocate staff
- Determine needs for Hurricane hardening
- Assist with obtaining building permits
- Provide cost estimate and GMP

Upon receipt of a Notice to Proceed from the City of North Port, we will work with SchenkelSchultz Architects and the project stakeholders to review the design documents and determine what adjustments may be necessary to address storm damage from Hurricane Ian and incorporate any components to make the structure a hardened facility. We will assist the design team with obtaining a building permit based on agreed upon changes and the final plans.

We will work hand and hand with the city to overcome any budget challenges utilizing the steps we have described on the following pages to arrive at an acceptable GMP. Upon GMP approval and receipt of building permits we will execute construction. We are proposing a phased renovation process to allow operations to continue in the existing facility while expediting the schedule.







PROPOSED SITE LOGISTICS PLAN NOTES

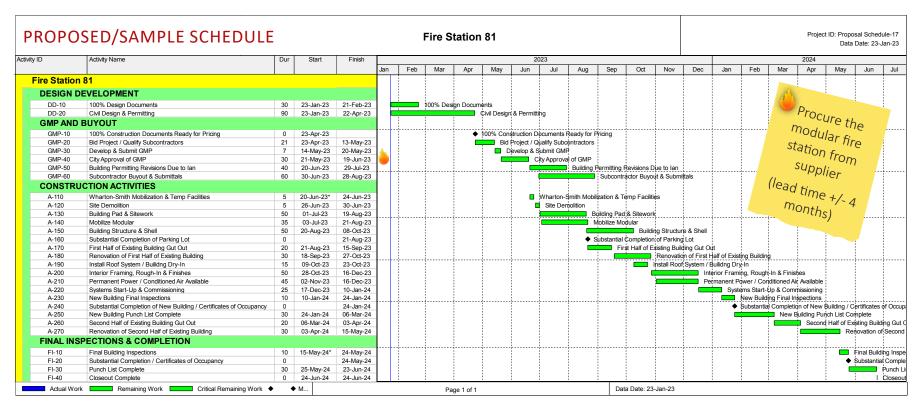
- 1. Mobilize to the site, set up our temporary facilities, install the perimeter fence to secure the site**
- 2. Construct the new parking lot and begin new construction on the addition
- 3. Install the modular fire station and remove the construction fence at parking lot
- 4. Relocate Fire/EMS/Bayflight employees into the modular fire station
- 5. Begin phase 1 renovation

- 6. Relocate staff into new addition upon completion
- 7. Begin work on the phase 2 renovation
- 8. Remove construction fence and demobilize



^{**}Maintaining security of the site will be a high priority since this fire station is located on an active campus. We will work closely with the city staff to coordinate construction activities and traffic around planned events.





PROJECT MANAGEMENT TECHNIQUES TO MEET THE PROJECT SCHEDULE

Our team takes scheduling very seriously. The project schedule is a living document that serves as a valuable tool for the entire project team. We live and work in a world where construction projects need to be completed as fast as possible with safety and budget also in mind. Our project schedules, from baselines to updates, provide us with a plan that will allow us to finish the project on time or early.

Our project schedules are created in-house with input from our entire project team. We use Primavera P6 scheduling software, which creates a computer-generated schedule utilizing the Critical Path Method of scheduling.

The project team will meet weekly during construction to accurately update the overall project schedule. The daily reports, subcontractor input, and field reviews are used to update the schedule and record what work has been put in place. Actual start dates, finish dates, and remaining durations are confirmed during the update. After each

update is complete, it is reviewed by the entire project team and adjusted, if necessary, so the plan going forward allows for an on-time or early finish. We then distribute copies of the project schedule to all subcontractors, design team members, and the Owner so they can incorporate these updates into their work plans. The durations and logic of the critical path and near critical path activities of the project schedule are reviewed due to their level of importance moving forward.

The schedule that we develop will be a pragmatic tool used by all parties, with all data entry and maintenance performed Wharton-Smith. The schedule is the mechanism that will initiate the discussion, review, agreement, and planning of the project sequence by the entire project team. We realize there may be drastic changes to the project scope due to Hurricane Ian. Once the scope of this project is finalized we will work closely with the project team to further develop the schedule.





PROJECT MANAGEMENT TECHNIQUES TO MEET **BUDGET REQUIREMENTS**

Every project is unique and requires a specific approach to maximize the program for the budget dollars that are available. It will be Wharton-Smith's job to work with the design team to maximize the best value for the City of North Port.

COST TRACKING & COST CONTROL DURING DESIGN

Cost control is maintained by constantly measuring cost against the original budget. Our Sr. Preconstruction Manager Juanmiguel Gorut, LEED AP will work directly with the City and the design team to document any changes or savings ideas for the project immediately. This will help the City make informed decisions in a timely manner. We will provide an estimate based on the current design and will make recommendations on how to bring your project in line with your budget.

The cost tracking system that our team implements involves the City every step of the way, and truly maintains the transparency for how the GMP is created, how it was administered and maintained, and how it is closed out.

Wharton-Smith has been successfully completing CMAR projects since 1995. We are proud to say that we have never exceeded a GMP on any CMAR project! This is a direct result of our effective cost control protocols, experienced personnel, the management systems we employ, and the relationships we build.

The benefits of our preconstruction plan include:

- √ Open book policy No hidden or internal cost
- Accurate cost estimates Historically within 2% of construction cost; this means maximum project scope!
- **Comprehensive logistics planning** Increase safety, increase efficiencies, and reduce costs
- Comprehensive scheduling Includes design, owner equipment, construction, and commissioning
- Comprehensive design reviews for constructability Increase quality control and reduce costs

At Wharton-Smith, we understand that one of the most critical phases of construction management takes place early in the development of the projects.

We strive to become your contractor of choice, with knowledgeable people who have the expertise and desire to provide you the best construction experience!

In recognizing that this commitment takes many steps to succeed in, the following phases of the construction budgeting process are part of every project and will be part of the Fire Station No. 81 Expansion and Remodel project.

BUDGETING PROCESS

We know that this project has a limited budget and therefore will take the following steps to control costs:

Phase I: Participation in Design Meetings

- Review current construction documents.
- Suggest ideas to enhance overall design.
- Identify existing conditions that could hinder and/ or improve the project.
- Formulate plans for improvement or alternate ideas. RE: Storm protection and hardening.

Phase II: Real Time Estimating

- Provide accurate estimating.
- Value-engineer alternatives to lower costs.
- Ensure the project stays within the proposed budget.

Phase III: Constructability Review

- Review the plans and specifications to be sure that the project can be economically constructed.
- Provide input on means and methods of proposed construction.
- Consider the impact of the design on cost, materials, and availability.

VALUE ENGINEERING CASE STUDY

Fire Stations #2 & #5 were constructed in an unprecedented and volatile construction market. It was critical that we carefully managed material costs and selections to keep the project within budget. Several value engineering items were presented to the county and the following were accepted:

Delete metal roofing and replace with TPO system (\$83,345), Delete tile floors except in bathrooms and replace with polished concrete (\$49,752), Reduce

size of parapets on building and app bay (\$34,334)

These value engineering measures resulted in over \$160,000 in savings to the county and ultimately, no budget increases.





Open and honest communication allows financial decisions to be made jointly. Equally important, it allows financial records to be kept with complete transparency. This policy starts from the very beginning and is maintained through close-out of the project.

SUBCONTRACTORS & BIDDING

It is important to verify that all the subcontractors bidding the project are qualified to perform the work. Some of the factors that we at Wharton-Smith look at include successful past direct experience, the design consultant's recommendation, manpower availability, bonding, past relevant experience, and the project staff. When the subcontractors are pre-qualified correctly, the award process is simply the lowest complete bid.

Due to our local presence, we have long standing relationships with local subcontractors. We will leverage these relationships to provide the best value for your project.

BID PACKAGES

We will structure the bid packages to ensure the most competitive pricing for the Owner. If the City chooses to utilize an "Owner Purchase Order" program, we will have a number of materials-only bid packages, which would then be assigned to the successful subcontractor. These packages will include items such as concrete material, reinforcing steel, doors and hardware, etc. This will result in the Owner receiving the maximum tax savings from the Owner Purchase Order Program with the lowest possible risk.

SCOPES OF WORK

Thorough scope of work developed prior to bidding and reviewed with all the bidders will minimize change orders, reduce uncertainty, preserve contingency, and result in better subcontractor pricing. Early in the preconstruction phase, we will start developing the scopes of work.

PRE-BID AND PRECONSTRUCTION CONFERENCES

We will hold sufficient conferences prior to the bidding of this project to ensure the subcontractors familiarity with this project. After the award of the subcontract and prior to mobilizing on site, we will hold a preconstruction conference with each major subcontractor. This will help the subcontractor to better understand the logistics of the project and review various critical elements of their work prior to mobilizing. The more we look ahead, the smoother the project will be.



The Wharton-Smith team employs an organized system of controls to ensure that costs are managed and controlled during all project phases through construction completion. Our cost controls begin with understanding the County's program requirements, analyzing the overall project budget, and aligning it with our construction estimates.

For cost accounting, Wharton-Smith uses Sage software to provide real-time cost analysis and reporting. Our onsite team will provide monthly project status reports to all stakeholders. We can also trend costs to predict labor productivity using our labor variance reporting. This comprehensive reporting system includes the following items:

- **Monthly Cost Narrative** Describes the current construction cost estimate status of the project.
- √ Cost Control Report Describes the current cost and payment status for the project.
- ✓ Project Accounting Report Provides detailed accounting of all expenditures for the project.

CONSTRUCTION SERVICES

Construction is the most complex phase related to coordination, communication, scheduling, and cost control. Our team provides you with the benefit of having highly experienced individuals working towards the same common goal, which is to provide the City and the surrounding community with a world-class facility of which all can be proud.

Before construction starts on site, our team will submit a site logistics, construction staging, and management plan addressing the following:

- √ Access to the construction site
- √ Material delivery, handling, and storage
- Major equipment delivery and installation
- √ Location and set-up of hoist cranes and other stationary equipment
- √ Coordination and maintenance of traffic concerns and issues
- √ Site office location
- √ Site Perimeter and Security Plan
- **Environmental Protection Plan**





With this approach the County, as well as other team members, will have a clear understanding of the project and can monitor the entire process as needed. This approach, combined with our team's experience, will ensure the project's success.

OCCUPIED SITE CASE STUDY

Members of our proposed team recently completed the new Airport Fire Fighter Training Facility (ARFF) that currently sits on the Public Safety complex property in Punta Gorda. The ARFF is located adjacent to Charlotte County's existing fire training tower. This tower is a very active facility that is used daily by Charlotte County Fire/EMS for necessary training. Significant planning and open communication with the county was required throughout construction to allow training to continue uninterrupted.

Detailed site logistics plans were implemented to ensure the safety of Fire/EMS staff and construction workers at all times. Our team is not only familiar with the logistics of working on and around active secured sites but also understands the unique characteristics of working on Public Safety projects.

QUALITY MANAGEMENT

The Wharton-Smith team has a culture of responsibility that embeds quality awareness in all our organizational processes. We are committed to quality control and quality assurance, customer satisfaction, and continuous improvement.

Our formal Quality Management (QM) program includes the development of clear, quantifiable, and measurable requirements. Our Quality Control staff will start by developing a plan tailored specifically for your Fire Station No. 81 Expansion and Remodel project. During preconstruction, project team meetings will be held regularly to discuss the constructability of the design details, conformity to state and local codes, compliance with material and product specifications, and sequencing of planned activities. Our team stresses a methodical stepby-step procedure focused on reporting mechanisms, which aim to resolve problems before they become critical while keeping everyone involved with the project fully informed and fully aware of all issues at hand.

Wharton-Smith's extensive QM program will provide the City with the knowledge, expectation, and follow-through to ensure that a quality project is completed on time and on budget. Our QM program focuses on constant feedback and improvement from the Owner, as we track and perform work.

Some of the ways we will ensure quality during the construction phase include:

- √ Holding pre-task meetings with our subcontractors
- Providing mock-ups in order to establish a level of quality
- ✓ Performing independent testing of installed systems

Throughout construction, our Project Executive, Caryn Huff and Area Superintendent, Doug Whisler will continually walk the project site, working with the architect and City representatives to ensure expectations of quality are being exceeded. All materials unloaded on site are inspected for completeness and construction quality from our suppliers. We recognize that quality work is the key to success on any project we undertake, and Wharton-Smith is committed to exceeding your expectations on this project!

Our team understands the significant benefit of providing the highest level of quality control measures and experience required to provide a superior finished product.

PROJECT MANAGEMENT TECHNOLOGIES

Construction is the most complex phase related to coordination, communication, scheduling, and documentation. We take pride in being on the cutting edge in technology use, computer-based management tools and support for record keeping, reporting, and document control. The following information systems are standard for all of our projects:

Project estimates are produced with Interactive Cost Estimating (ICE) by MC2. With an ever increasing need for accurate estimates and cost analysis, ICE provides consistency in price estimating for our clients.

Our team uses RedTeam, a multi-faceted database application that combines the properties of an exceptional project management tool with the enhanced communication capabilities of a website application. The project staff will manage the RedTeam database in the course of administrating the project.

We provide monthly Project Status Reports to all stakeholders. Some information that is typically provided in our status reports include a narrative of the current progress and schedule of the project, permitting status, accounting breakdowns, Owner Direct Purchase Order, Contingency, and Value Engineering logs, submittal and RFI status, and progress photographs.





Wharton-Smith also uses **Matterport Scanner Technology** which allows our team to create 3D digital "twins" of any physical space through 360 degree photography and 3D scanning. The benefits of this technology are endless and our team has already experienced time and cost savings. Matterport Scanners can:

- √ Generate point clouds for as-builts and construction documentation
- √ Take measurements of difficult to access areas such as pipes, trusses, and beams
- ✓ Provide collaborative 3D Project Reviews
- √ Virtually communicate key milestones quickly and effectively
- √ Reduce the number of site visits
- ✓ MEP above ceiling coordination with existing conditions
- Expedite the resolution of RFIs and constructability concerns

Our capabilities with Matterport technology will be critical to documenting the existing conditions of your project!

SAFETY PROGRAMS

Wharton-Smith has a comprehensive safety program that includes written programs for Hazard Communication, Fall Protection, General Safety and Drug/Alcohol Abuse. All field supervisory personnel, superintendents, and assistant superintendents have been OSHA certified as competent persons in at least one of the following: Trenching, Scaffolding, Confined Space, and/or Fall Protection. In addition, each project has at least one employee trained in CPR and First Aid. All employees are required to go through the company's basic safety orientation. We actively pursue and encourage any specialized training that would benefit our employees.

Thorough jobsite safety inspections are conducted continuously throughout the project by our on-site safety personnel. Each project is also inspected by our Safety Department staff on a weekly basis and the reports are personally reviewed by our management team including the President of the company. Wharton-Smith's safety record speaks for itself. The company has been honored with many safety awards since our incorporation, including national awards for Safety Excellence in Construction and Best Overall Safety Program.

POST-CONSTRUCTION SERVICES

CLAIMS MANAGEMENT

Wharton-Smith believes that potential conflicts can easily



be avoided by developing trustworthy relationships early on with all parties involved on a project and by encouraging open communication. A well-planned project will have minimal exposure to claims. Again, we will approach any claim issues the same way we would approach a change order. We will verify if the subcontractor has a legitimate claim, and only if they do, we will submit it to the Owner and architect.

PROJECT CLOSE-OUT

At the beginning of the project the team will have a formal meeting to discuss the project closeout process. Through this meeting, a detailed plan will be developed identifying the steps required to close-out the project. This plan will be written and communicated to the entire staff and is devised to ensure a minimal punch list and quick occupancy of your projects. The close-out plan will include the following:

- ✓ Operation maintenance (O&M) manuals/ executed project warranties
- √ As-Built drawings
- √ Close-out letter
- √ Subcontractor close-out meeting
- ✓ Project close-out summary

WARRANTY PERIOD SERVICES

Our approach to a successful warranty period begins with a well-constructed job. Our team has an established system to provide the City with the best possible warranty and post warranty service. Our response to warranty issues is immediate. The quicker we react and follow up on warranty issues, the quicker things get done.

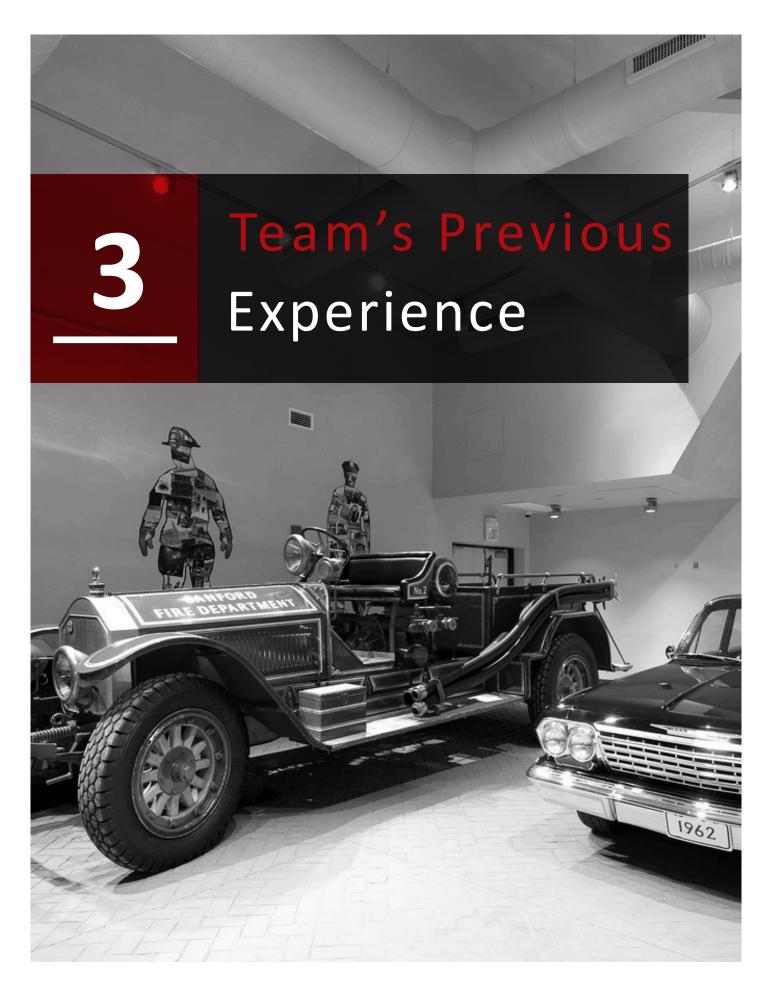
Have a warranty request? It's as simple as emailing us at:

WARRANTY@WHARTONSMITH.COM

And we take care of the rest!

Our team will remain responsive long past the warranty period to assist the City with anything that may surface having to do with the design and construction of the project. Our services don't just end when the warranty runs out. We intend to be a lifelong partner to you and are committed to providing you with a building that will stand the test of time.

Wharton-Smith, Inc. is within the City limits and can respond rapidly!





TEAM SYNERGY	Caryn Huff Project Executive	Doug Whisler Area Superintendent	John Carlson Sr. Project Manager	Jay Coker Superintendent	Mike Schreiber Project Engineer	Juanmiguel Gorut Sr. Precon. Manager
1. CHARLOTTE COUNTY FIRE STATION #2	•	•	•	•	•	•
2. CHARLOTTE COUNTY FIRE STATION #5	•	•	•	•	•	•
3. LONGBOAT KEY FIRE STATIONS #91 AND #92	•	•				•
4. CHARLOTTE COUNTY TEMPORARY FIRE STATION #9	•	•		•		•
5. NORTH PORT FIRE TRAINING TOWER	•	•			•	•
PROJECT SIMILARITIES	5	FIRE RESCUE FACILITY	HARDENED STRUCTURE	TEMP. HOUSING FACILITY	ADMIN / SUPPORT SPACE	CMAR DELIVERY
1. CHARLOTTE COUNTY FIRE STATION #2		•	•		•	•
2. CHARLOTTE COUNTY FIRE STATION #5		•	•		•	•
3. LONGBOAT KEY FIRE STATIONS #91 AND #	† 92	•	•	•	•	•
4. CHARLOTTE COUNTY TEMPORARY FIRE STATIC	N #9	•		•		•
5. NORTH PORT FIRE TRAIN	ING TOWER	•				







Charlotte County, Fire Station #2

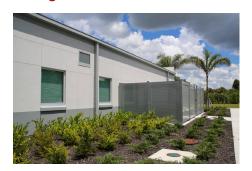
Port Charlotte, FL

This is a new 12,727 SF fire station that consists of 3 apparatus bays, 12 bunk rooms, offices, a conference room, secure EMS storage, a fully equipped kitchen, a fitness room, a dayroom, and dedicated decontamination areas. The decontamination areas are located directly off the Apparatus Bay, so that crew members can clean up after a call without entering the living area minimizing the spread of any contamination. These decontamination areas contain bunk gear storage, bunk gear cleaning areas, personnel showers, and have a dedicated HVAC system.

Fire Station #2 also has a large-scale fueling area containing diesel fuel, unleaded gasoline, and DEF tanks and dispensing equipment.

Special features related to your project:

The building is considered a hardened building, complete with Level E missile rated impact glass and doors and a full standby generator fueled by two 1,000-gallon underground LP tanks.







Project Owner

Charlotte County, FL 18500 Murdock Circle Port Charlotte, FL 33948 Travis Perdue, Project Manager P: (941) 769-0915 E: travis.perdue@charlottecountyfl.gov

Size and Project Type

12,727 SF

New Construction

Completion Date

7/2022

Construction Cost \$5,500,000

Key Personnel

Caryn Huff

Project Executive

John Carlson

Project Manager

Doug Whisler

Sr. Project Superintendent

Jay Coker

Superintendent

Mike Schreiber

Project Engineer

Juanmiguel Gorut, **Preconstruction Services**







Charlotte County, Fire Station #5

Punta Gorda, FL

Fire Station #5 consists of 9,232 SF including 2 apparatus bays, 8 bunk rooms, offices, secure EMS storage, a fully equipped kitchen, a fitness room, a dayroom, and dedicated decontamination areas. The decontamination areas are located directly off the Apparatus Bay, so that crew members can clean up after a call without entering the living area minimizing the spread of any contamination. These decontamination areas contain bunk gear storage, bunk gear cleaning areas, personnel showers, and have a dedicated HVAC system.

The building is considered a hardened building, complete with Level E missile rated impact glass and doors and a full standby generator fueled by two 1,000-gallon underground LP tanks.

Special features related to your project:

The building is considered a hardened building, complete with Level E missile rated impact glass and doors and a full standby generator fueled by two 1,000-gallon underground LP tanks.







Project Owner

Charlotte County, FL 18500 Murdock Circle Port Charlotte, FL 33948 Travis Perdue, Project Manager P: (941) 769-0915 E: travis.perdue@charlottecountyfl.gov

Size and Project Type

9,232 SF

New Construction

Completion Date

5/2022

Construction Cost

\$4,500,000

Key Personnel

Caryn Huff

Project Executive

John Carlson

Project Manager

Doug Whisler

Sr. Project Superintendent

Jay Coker

Superintendent

Mike Schreiber

Project Engineer

Juanmiguel Gorut

Preconstruction Services







Town of Longboat Key, Fire Stations #91 and #92

Longboat Key, FL

Wharton-Smith, in partnership with Jon F. Swift Construction, provided construction services to the Town of Longboat Key for Fire Stations #91 and #92. This project consisted of an extensive renovation effort to the existing Station #91 while occupied, and the tear down and new construction of Station #92 to serve as a prototype.

The interior modifications of Station #91 included the kitchen, fitness space, restrooms, storage, decontamination room, and standby power. Station #92 consisted of demolition of the existing building with the new fire station being built on the same property. The new station is a one-story three-bay building.

Special features related to your project:

The existing fire department staff was housed on site in a temporary modular fire station. Construction had to be coordinated around staff on site to allow construction to progress. To optimize efficiencies during the construction process, we performed construction at both locations simultaneously with a drastic overlap in the schedule.



Project Owner

Town of Longboat Key, FL 600 General Harris Street Longboat Key, FL 34228 Charles Mopps P: (941) 486-2422 E: cmopps@longboatkey.org

Size and Project Type

Station #91: 9,183 SF Station #92: 9,9594 SF

Completion Date 6/2021

Construction Cost \$6,000,000

Key Personnel

Caryn Huff Sr. Project Manager

Doug Whisler Sr. Project Superintendent

"The project team was diligent and always willing to come up with creative solutions. Wharton-Smith displayed commitment and innovation, by providing solutions to supply chain issues. Wharton-Smith's Public Safety experience coupled with their culture of integrity and responsibility, ensured a high-quality project."

- Charles Mopps, PMP, Town of Longboat Key, Projects Manager







Charlotte County, Fire Station #9

Babcock Ranch, FL

This project is a modular building that contains 3 bunk rooms, bunker gear storage, decon area and living facilities to temporarily house Fire/EMS staff in the Babcock Ranch community. A new permanent station will be constructed in its place in 2023.

Special features related to your project:

During pre-construction, it was determined that Charlotte County Fire/EMS needed a Decon space within the modular fire station. Wharton-Smith worked with the County and the Modular Building Manufacturer to incorporate a Decon Room at the back of the temp fire station that included a separate exterior door and separate air conditioning system. This change ensured the health and safety of the Fire Dept personnel inhabiting the temporary fire station.





Project Owner

Charlotte County, FL 18500 Murdock Circle Port Charlotte, FL 33948 Justin Dunn, Project Manager P: (941) 743-1392 E: justin.dunn@charlottecountyfl.gov

Size and Project Type

1,500 SF

Temporary Facility

Completion Date 12/2020

Construction Cost \$200,000

Key Personnel

Caryn Huff

Sr. Project Manager

Doug Whisler

Sr. Project Superintendent

Jay Coker

Superintendent

Juanmiguel Gorut

Preconstruction Services







North Port Fire Training Tower

North Port, FL

Wharton-Smith is currently providing Construction Management services for the construction of a Mobile Fire Training Unit consisting of a Class A training tower with an approximate size of 8,000 SF for the entire structure.

Special features related to your project:

This project is within the City of North Port and has allowed us to gain an understanding of the Fire Rescue Department operations and training procedures. Additionally, we have established excellent working relationships with City staff and the building department.



Project Owner

City of North Port 4980 City Center Blvd. North Port, FL 34286 Chief Scott Titus P: (941) 240-8153 E: stitus@cityofnorthport.com

Size and Project Type 8,000 SF

Completion Date Anticipated 12/2022

Construction Cost \$1,400,000

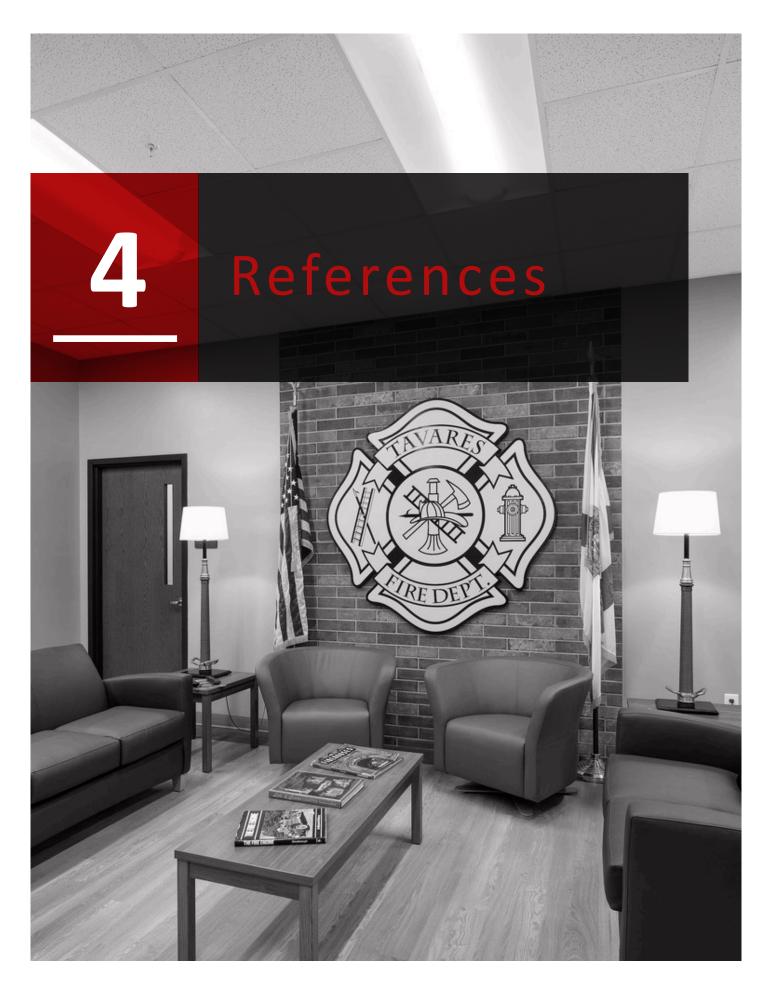
Key Personnel Caryn Huff

Project Executive

Doug Whisler Area Superintendent

Mike Schreiber **Project Engineer**







ATTACHMENT 3 REFERENCES/CLIENT LISTING

Include at least two (2) References and no more than five (5) References within the last 10 years of projects with similar scope as listed in this RFP. The Project Manager and the key project members in the proposed project team must show relevant experience in five (5) referenced similar projects.

1. Business/Customer Name: Charlotte County Facilities	3
Name of Contact Person/Title: Pedro Agosto, Project	
	-mail pedro.agosto@charlottecountyfl.gov
Address 18500 Murdock Circle, Port Charlotte, FL 33	3948
Phone Number 941-743-1913	
Duration of Contract or business relationship 2/21-6/	Project completion date: 6/2022
Type of Services Provided CMAR	
Cost of Project: Design (if known) \$500,000	Construction: \$9,927,299
2. Business/Customer Name: Town of Longboat Key	•
Name of Contact Person/Title: Chief Paul Dezzi	
Telephone# <u>941-316-1944</u> Fax N/AE	- _{mail_} pdezzi@longboatkey.org
Address 2162 Gulf of Mexico Dr, Longboat Key, FL 3	34228
Phone Number 941-316-1944	
Duration of Contract or business relationship $3/20 - 6/2$	1Project completion date: 6/21
Type of Services Provided CMAR	
Cost of Project: Design (if known) Unknown	Construction: \$6,000,000
3. Business/Customer Name: Charlotte County Fire E	MS
Name of Contact Person/Title: Chief John Molenda	
Telephone# 941-833-5603 Fax N/A	- _{mail_} john.molenda@charlottecountyfl.gov
Address 26571 Airport Road, Punta Gorda, FL, 3	33982
Phone Number 941-833-5603	
Duration of Contract or business relationship 2/21-6/22	Project completion date: 6/2022
Type of Services Provided CMAR	
Cost of Project: Design (if known) \$500,000	Construction: \$9,927,299

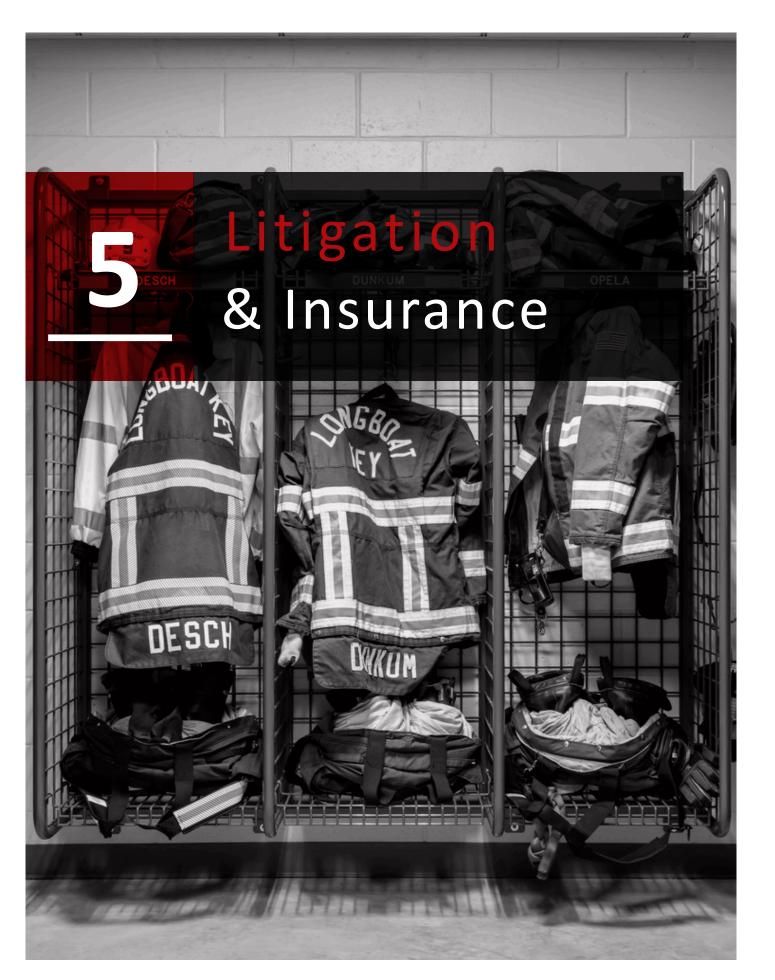




4. Business/Customer Name: Charlotte County Fire	Department
Name of Contact Person/Title: Larry Lippel, Batt	talion Chief / ARFF / AMF
Telephone# 941-628-7813 Fax N/A	E-mail larry.lippel@charlottecountyfl.gov
Address 26571 Airport Road, Punta Gorda, FL 3	33982
Phone Number 941-628-7813	<u> </u>
OMAD	ears Project completion date: 5/24/2022 (Substantia
Cost of Project: Design (if known) Unknown	
5. Business/Customer Name:	
Name of Contact Person/Title:	
Telephone#Fax	E-mail
Address	
Phone Number	<u> </u>
Duration of Contract or business relationship	Project completion date:
Type of Services Provided	
Cost of Project: Design (if known)	Construction:
Date: 11/3/2022	
Signed (Person authorized to bind the company):	form (aus)
Name (printed): Tom larossi	Title: Vice President

THIS FORM MUST BE COMPLETED AND SUBMITTED WITH PROPOSAL.







Litigation and Insurance

We believe that potential conflicts can easily be avoided by developing trustworthy relationships with all parties. The successes we have had on our projects are due to our commitment to partnering and conflict prevention. Occasionally, a situation arises where a third party mediation is needed, despite efforts to avoid it. Our litigation record for the past five years is as follows:

UCF Stadium Corporation f/k/a Golden Knights Corporation, et al. vs. Dant Clayton Corporation, Wharton-Smith, Inc., et al. (Case No. 2017-CA-008259-O, The Circuit Court, Ninth Judicial Circuit, Orange County, Florida): In September 2017, UCF filed suit against Dant Clayton Corporation, Wharton-Smith, and others over alleged breach of contract regarding the design-build contracts for the construction of their stadium. Wharton-Smith was then dismissed from the suit with a Tolling Agreement that they could be brought back in before April 1, 2019. In December 2018, Wharton-Smith was brought back into the lawsuit. The suit was settled at mediation in January 2020.

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	750 Monroe Road				URER D : XL Spec				37885
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-	OWNED AUTOS ONLY AUTOS ONLY X AUTOS ONLY X NON-OWNED AUTOS ONLY						BODILY INJURY (Per accident)	\$	
ŀ	X HIRED AUTOS ONLY X NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	\$	
4	X UMBRELLA LIAB X OCCUR	Υ	Υ	CU21171470101	04/01/2022	04/01/2023	EACH OCCURRENCE	\$5,000	,000
	EXCESS LIAB CLAIMS-MADE						AGGREGATE	\$5,000	,000
_	DED X RETENTION \$0 WORKERS COMPENSATION						▼ PER OTH-	\$	
۱ ۲	AND EMPLOYERS' LIABILITY V/N		Υ	WC203610916	04/01/2022	04/01/2023	↑ ISTATUTE IER	4 000	000
	ANY PROPRIETOR/PARTNER/EXECUTIVE N OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	N/A					E.L. EACH ACCIDENT	\$1,000	
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	\$1,000	
5	Rented Equipment			UM00024961MA22A	04/01/2022	04/01/2023		,	,
- I	Pollution Liab	Υ		PCADB50178540422	04/01/2022	04/01/2023	5,000,000		
	Professional Liab			PCADB50178540422	04/01/2022				
Cert Liab excl	RIPTION OF OPERATIONS / LOCATIONS / VEHIC ifficate holder is additional insure illity and Umbrella only if require usions as specified in the policie	ed a d by es.	s res	spects General Liability, A tten contract, and subject	utomobile Lia to the terms,	bility, Pollu conditions	ation and		
Sec	erage is primary as respects to 0 Attached Descriptions)	Sene	ral l			-contributo	ry as subject		
ER	TIFICATE HOLDER			CA	NCELLATION				
For Informational Purposes Only				1	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.				
				AUT	AUTHORIZED REPRESENTATIVE				
				© 1988-2015 ACORD CORPORATION. All rights reserved.					







REQUEST FOR PROPOSAL NO. 2023-07 FIRE STATION NO. 81 EXPANSION AND REMODEL - CONSTRUCTION MANAGER (CM) AT RISK

REQUIREMENTS AND METHOD OF SUBMITTAL

TAB 6 CITY REQUIRED FORMS – This checklist is provided to assist each Proposer in the preparation of their response. Included in this checklist are important requirements, which is the responsibility of each Proposer to submit with their response in order to make their response fully compliant. It is the responsibility of each Proposer to read and comply with the solicitation in its entirety.

A. REQUIRED SUBMITTAL FORMS: Provide fully executed forms.							
X_ATTACHMENT 1:	Proposal Submittal Signature Form						
X_ATTACHMENT 2:	Statement of Organization						
X_ATTACHMENT 3: City will be sending timely fashion.	References – Consultant is to contact the references and advise his/her references that the an e-mail and reference form which needs to be completed and e-mailed back to the City in a						
X_ATTACHMENT 4:	Drug-Free Workplace						
X_ATTACHMENT 5:	Public Entity Crime Information						
X_ATTACHMENT 6:	Non-Collusive Affidavit						
X_ATTACHMENT 7:	Lobbying Certification						
X_ATTACHMENT 8:	Conflict of Interest Form						
X_ATTACHMENT 9:	Disclosure Form (Consultant/Engineer/Architect)						
X_ATTACHMENT 10:	Scrutinized Company Certificate						
X_ATTACHMENT 11:	Vendor's Certification For E-Verify System						
X SAMPLE INSURANCE of previous certificate or oth Liability and the dollar amount	CERTIFICATE: Demonstrate your firm's ability to comply with insurance requirements. Provide a er evidence listing the Insurance Companies names for both Professional Liability and General punts of the coverage.						
Enterprise, the Prime Firm	laiming either Minority Business Enterprise/Women Business Enterprises/Veteran Business (not sub-consultant) shall be certified as a Minority Business Enterprise by the State of Florida, nt Services, Office of Supplier Diversity pursuant to Section 287.0943, Florida Statutes.						
YES, CLAIMING STATUS AS PRIME ONLY							
YES, I'VE ATTACHED THE CERTIFICATE OF MBE/WBE STATUS FROM THE STATE OF FLORIDA AS OUTLINED SECTION 1.							
X_NOT CLAIMING MBE/WBE /VBE							
PLEASE INITIAL AND RETURN WITH YOUR PROPOSAL.							
	INITIALS THIS PAGE MUST BE COMPLETED AND SUBMITT						





TIRE STATION NO. 01 EXPANSION AND RENIQUEE — CONSTRUCTION MANAGER (CM) AT RISK

ATTACHMENT 1 PROPOSAL SUBMITTAL SIGNATURE FORM

The undersigned attests to his/her authority to submit this proposal and to bind the firm herein named to perform as per Agreement, if the firm is awarded the Agreement by the City.

The undersigned further certifies that he/she has read the Request for Proposal, Terms and Conditions, Insurance Requirements and any other documentation relating to this request and this proposal is submitted with full knowledge and understanding of the requirements and time constraints noted herein.

As addenda are considered binding as if contained in the original specifications, it is critical that the firm acknowledge receipt of same. The submittal may be considered void if receipt of an addendum is not acknowledged.

Addendum No. 1	Dated 9/26/2022	Addendum No. 4	Dated	
Addendum No. 2	Dated 10/5/2022	Addendum No. 5		
Addendum No. 3	Dated 10/11/2022	Addendum No. 6	Dated 10/28/2022	
Company Name Wharte	on-Smith, Inc.			
813-436-6521	tia	rossi@whartonsmith.com	N/A	
Telephone #	E-I	Mail	Fax#	
750 Monroe Road				
Main Office Address				
Sanford		FL	32771	
City		State	Zip Code	
2525 Bobcat Village Cer	nter Road, Unit 105			
North Port		FL	34288	
City		State	Zip Code	
941-621-4723	chuff@wha	rtonsmith.com	N/A	
Telephone #	E-mail		Fax #	
Tom Iarossi, Vice Presid	ent			
Name & Title of Firm I	Representative			
for aus			11/3/2022	
Signature			Date	
Do you accept Visa?	YES XNO			





REQUEST FOR PROPOSAL NO. 2023-07

FIRE STATION NO. 81 EXPANSION AND REMODEL - CONSTRUCTION MANAGER (CM) AT RISK

ATTACHMENT 2

STATEMENT OF ORGANIZATION

(Information Sheet for Transactions and Conveyances Corporation Identification)

The following information will be provided to the City of North Port for incorporation in legal documents. It is, therefore, vital all information is accurate and complete. Please be certain all spelling, and capitalization is exactly as registered with the state or federal government.

Name of Respondent: Wharton-Smith, Inc.	-
DBA (if any): N/A	
Type of Entity (Sole Proprietor, Corporation, LLC, LLP, I	Partnership, etc): Corporation
Business Address: 2525 Bobcat Village Center R	load, Unit 105, North Port, FL 34288
Phone: 941-621-4723	Fax: N/A
E-Mail tiarossi@whartonsmith.com	
Print Name and Title of person authorized to bind: \overline{T}	om Iarossi, Vice President
Federal Identification Number: 59-2392802	
Signature: om Caro	
Signature.	-
Respondent shall submit proof that it is authorized to doy law.	lo business in the State of Florida unless registration is not required
s this a Florida Corporation:	(Please Check One) Yes or No
If not a Florida Corporation, In what state was it created: Name as spelled in that State:	
What kind of corporation is it:	✓"For Profit" or"Not for Profit"
s it in good standing:	Yes or No
Authorized to transact business in Florida:	✓_Yes orNo
State of Florida Department of State Certificate of Auth	hority Document No.: G94383
Does it use a registered fictitious name:	Yes or <u>V</u> No





Names of Officers:	
President: Timothy S. Smith	Secretary: Stephanie L. Pompeo
Daniel F Daniel	Decelle Decel
Vice President: Ronald F. Davo	Dli, CEOTreasurer: Ronald F. Davoli
Patrick J. Hewitt, COC	Darin A. Crafton, COO, Commercial
Other:	Other:
Name of Corporation (As used in Flor Wharton-Smith, Inc.	rida):
(Spelled exactly as it is	registered with the state or federal government)
Corporate Address:	
Post Office Box:	N/A
City, State Zip:	N/A
Street Address:	750 Monroe Road
City, State, Zip:	Sanford, FL 32771
	ed before me by means of \underline{X} physical presence or $\underline{\hspace{0.5cm}}$ online notarization, this by $\underline{\hspace{0.5cm}}$ for larossi
	Notary Public - State of Florida
Personally Known <u>X</u> OR Produced Type of Identification Produced	Identification DESIREE STRICKLING Notary Public - State of Florida Commission # HH 048139 My Comm. Expires Jan 18, 2025 Bonded through National Notary Assn.
Date: 11/3/2022	
Signed (Person authorized to bind th	e company):
Name (printed): Tom larossi	Title: Vice President





ATTACHMENT 4 DRUG FREE WORKPLACE FORM

The	undersigned	Consultant	in	accordance	with	Florida	Statute	287.087	hereby	certifies	that
Whar	ton-Smith, Inc.						does:				

(Company Name)

- 1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
- 2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
- 3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
- 4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
- 5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
- 6. Make a good faith effort to continue to maintain a drug free workplace through implementation of this section.

Check one:

As the person authorized to sign this statement, I certify that this firm complies fully with above requirements.

As the person authorized to sign this statement, this firm does not comply fully with the above requirements.

Offeror's Signature

11/3/2022

Date





ATTACHMENT 5 PUBLIC ENTITIY CRIME INFORMATION

As provided by F.S. §287.133, a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a Contractor, Supplier, Subcontractor, or Consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.

i, Iom larossi		thorized representative of the Respondent,
Wharton-Smith, Inc.	, located at 2525	Bobcat Village Center Road, Unit 105
City: North Port Sta		288, have read and understand
		om replying to this solicitation because of F.S.
§287.133.		
Signature: om aus	Date:	2022
Telephone #: 941-621-4723	Fax #: <u>N/A</u>	
Federal ID #: 59-2392802		
STATE OF Florida CITY OF North Port Sworn to (or affirmed) and subscribed before a day of November 2022, by	ore me by means of X physical Tom larossi	ical presence oronline notarization, this
Personally Known X OR Produced Ident Type of Identification Produced		DESIREE STRICKLING Notary Public - State of Florida Commission # HH 048139 My Comm. Expires Jan 18, 2025 proce: Indush Nations, Notary Assn.
Date: 11/3/2022	Je 00 105-201	The state of the s
Signed (Person authorized to bind the com	pany): Jon Jour	
Name (printed): Tom Iarossi	Ti	tle: Vice President

THIS PAGE MUST BE COMPLETED AND SUBMITTED WITH PROPOSAL.



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ATTACHMENT 6 NON-COLLUSIVE AFFIDAVIT State of Florida City of North Port Before me, the undersigned authority, personally appeared: Tom larossi _____ who, being first duly sworn, deposes and says that: 1. He/She is the Officer (Owner, Partner, Officer, Representative or Agent) of Wharton-Smith, Inc. , the Respondent that has submitted the attached reply; 2. He/She is fully informed respecting the preparation and contents of the attached reply and of all pertinent circumstances respecting such reply; 3. Such reply is genuine and is not a collusive or sham reply; 4. Neither the said Respondent nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant, have in any way colluded, conspired, connived or agreed, directly or indirectly, with any other respondent, firm, or person to submit a collusive or sham reply in connection with the work for which the attached reply has been submitted; or have in any manner, directly or indirectly sought by agreement or collusion, or communication or conference with any respondent, firm, or person to fix the price or prices in the attached reply or of any other respondent, or to fix any overhead, profit, or cost elements of the reply price or the reply price of any other respondent, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against (Recipient), or any person interested in the reply work. Signed, sealed and delivered this _____ day of November Tom larossi (Printed Name) Vice President (Title) STATE OF Florida CITY OF North Port Sworn to (or affirmed) and subscribed before me by means of $\frac{X}{X}$ physical presence or $\frac{X}{X}$ online notarization, this ___ day of November 2022, by Tom larossi Notary Public - State of Florida Personally Known X OR Produced Identification DESIREE STRICKLING Notary Public - State of Florida Type of Identification Produced Commission # HH 048139

THIS PAGE MUST BE COMPLETED AND SUBMITTED WITH PROPOSAL



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My Comm. Expires Jan 18, 2025 Bonded through National Notary Assn



ATTACHMENT 7 LOBBYING CERTIFICATION

"The undersigned hereby certifies, to the best of hi	is or her knowledge and belief, that":
STATE OF Florida	
CITY OF North Port	
This 3rd day November	of 2022
Tom larossi	, being first duly sworn, deposes and says that he or she is the authorized
Port solicitation, with any City of North Port elected individuals working with the city in respect to this the restrictions outlined in the General Terms and Companies of the probability of the persons shall not be lobbiled qualification and/or any other solicitations released process. The selection process is not considered determination.	(Name of the contractor, firm or individual), and that the vendor and unication with, or discuss any matter related in any way to any active City of North ed officials, officers, their appointees or their agents or any other staff or outside request other than the designated Procurement Official Contact and to abide by Conditions of the Solicitation. Technical questions directed to the project manager, d, either individually or collectively, regarding any questions for bid, proposal, d by the city. To do so is grounds for immediate disqualification from the selection d final until such a tome as the Commission has made a final and conclusive
	will be paid, by or on behalf of the undersigned, to any person for influencing or tly an officer or employee of the City, City Commission in connection with the
influence a member of City Commission or an offic	ds have been paid or will be paid to any person for influencing or attempting to ser or employee of the City in connection with this contract, the undersigned shall Form to Report Lobbying", in accordance with its instructions. day of November , 2022.
	By: Jon Cous
	Tom larossi
	(Printed Name) Vice President
	(Title)
STATE OF Florida CITY OF North Port	
Sworn to (or affirmed) and subscribed befor 3rd day of November 2022, by To	re me by means of physical presence oronline notarization, this om larossi
	Notary Public - State of Florida
Personally Known <u>X</u> OR Produced Identific Type of Identification Produced THIS PAGE MUST	DESIREE STRICKLING Notary Public - State of Florida Commission # HH 048139 My Comm. Expires Jan 18, 2025 BE COMPLETED AND SUBNIT FED WATT PROPOGALNOTARY Assn.

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REQUEST FOR PROPOSAL NO. 2023-07 FIRE STATION NO. 81 EXPANSION AND REMODEL - CONSTRUCTION MANAGER (CM) AT RISK

ATTACHMENT 8 CONFLICT OF INTEREST FORM

F.S. §112.313 places limitations on public officers (including advisory board members) and employees' ability to contract with the City either directly or indirectly. Therefore, please indicate if the following applies:

FART I.
I am an employee, public officer or advisory board member of the City(List Position Or Board)
I am the spouse or child of an employee, public officer or advisory board member of the City Name:
An employee, public officer or advisory board member of the City, or their spouse or child, is an officer, partner director, or proprietor of Respondent or has a material interest in Respondent. "Material interest" means direct or indirect ownership of more than 5 percent of the total assets or capital stock of any business entity. For the purposes of [§112.313], indirect ownership does not include ownership by a spouse or minor child. Name:
Respondent employs or contracts with an employee, public officer or advisory board member of the City Name:
X_None Of The Above
PART II:
Are you going to request an advisory board member waiver?
I will request an advisory board member waiver under §112.313(12)
I will NOT request an advisory board member waiver under §112.313(12)
X _{N/A}
The City shall review any relationships which may be prohibited under the Florida Ethics Code and will disqualify an vendors whose conflicts are not waived or exempt.
BUSINESS NAME: Wharton-Smith, Inc.
NAME (PERSON AUTHORIZED TO BIND THE COMPANY): Tom larossi, Vice President
SIGNATURE: DATE: 11/3/2022





REQUEST FOR PROPOSAL NO. 2023-07

FIRE STATION NO. 81 EXPANSION AND REMODEL - CONSTRUCTION MANAGER (CM) AT RISK

ATTACHMENT 9

DISCLOSURE FORM FOR

CONSULTANT/ENGINEER/ARCHITECT

Please select (only) one of the following three options:	
X Our firm has no actual, potential, or reasonably perceived, financial* or other interest** in the outcome of the pro	ject.
Our firm has a potential or reasonably perceived financial* or other interest** in the outcome of the project as	
described here:	
Our firm proposes to mitigate the potential or perceived conflict according to the following plan:	
Our firm has an actual financial* or other interest** in the outcome of the project as described here:	
*What does "financial interest" mean?	
If your firm, or employee of your firm working on the project (or a member of the employee's household), will/marperceived to receive or lose private income depending on the government business choices based on your firm's find and recommendations, this must be listed as a financial interest. An example would be ownership in physical as affected by the government business choices related to this project. The possibility of contracting for further consultance is not included in this definition and is not prohibited.	lings ssets
**What does "other interest" mean?	
If your firm, or employee of your firm working on the project (or a member of the employee's household), will/maperceived to have political, legal or any other interests that will affect what goes into your firm's findings recommendations, or will be/may be perceived to be affected by the government business choices related to this prothis must be listed as another interest.	and
BUSINESS NAME: Wharton-Smith, Inc.	
NAME (PERSON AUTHORIZED TO BIND THE COMPANY): Tom Iarossi, Vice President	
SIGNATURE: DATE: 11/3/2022	





ATTACHMENT 10 Scrutinized Company Certification Form

W			
Company Name: Wharton-Smith, Inc.			
Authorized Representative Name and Title: _	Tom Iarossi, Vice Pr	esident	
Address: 2525 Bobcat Village Center Road, Unit 10	⁵ City: North Port	State: FL	_{ZIP:} 34288
Phone Number: 941-621-4723		ssi@whartonsmith.com	
A company is ineligible to, and may not, bid on goods or services of any amount if, at the time the company is on the Scrutinized Companies engaged in a boycott of Israel.	e of bidding on, submitting	g a proposal for, or entering in	to or renewing such contract
A company is ineligible to, and may not, bid on goods or services of \$1 million or more if, at contract, the company is on the Scrutinized Colran Petroleum Energy Sector List, created purperations in Cuba or Syria.	the time of bidding on, su ompanies with Activities in	ubmitting a proposal for, or el Sudan List, the Scrutinized Co	ntering into or renewing such Impanies with Activities in the
	CHOOSE ONE OF THE FO	OLLOWING	
X This bid, proposal, contract or contract re on behalf of the above-named company, named company is not participating in a	and as required by Florida		
This bid, proposal, contract or contract re on behalf of the above-named company, named company is not participating in a behalf companies with Activities in tor Syria.	and as required by Florida boycott of Israel, is not on t	Statutes, section 287.135(5), I the Scrutinized Companies wit	hereby certify that the above- h Activities in Sudan List or the
I understand that pursuant to Florida Statutes of the contract if one is entered into, and man Certified By: AUTHORIZED REPRESENTATIVE SIGNAL	y subject the above-named		
Print Name and Title: Tom Iarossi, Vice F	resident		
Date Certified: 11/3/2022			

THIS PAGE MUST BE COMPLETED AND SUBMITTED WITH PROPOSAL.



Solicitation/Contract/PO Number (Completed by Purchasing): _



ATTACHMENT 11 VENDOR'S CERTIFICATION FOR E-VERIFY SYSTEM

STATE O	F Florida
CITY OF	North Port

The undersigned Vendor/Consultant/Contractor (Vendor), after being duly sworn, states the following:

- 1. Vendor is a person or entity that has entered into or is attempting to enter into a contract with the City of North Port (City) to provide labor, supplies, or services to the City in exchange for salary, wages or other renumeration.
- 2. Vendor has registered with and will use the E-Verify System of the United States Department of Homeland Security to verify the employment eligibility of:
 - a. All persons newly hired by the Vendor to perform employment duties within Florida during the term of the contract;
 - b. All persons, including sub-contractors, sub-vendors or sub-consultants, assigned by the Vendor to perform work pursuant to the contract with the City.
- 3. If the Vendor becomes the successful Contractor who enters into a contract with the City, then the Vendor will comply with the requirements of Section 448.095, Fla. Stat. "Employment Eligibility", as amended from time to time.
- 4. Vendor will obtain an affidavit from all subcontractors attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien as defined in 8 United States Code, Section 1324A(H)(3).
- 5. Vendor will maintain the original affidavit of all subcontractors for the duration of the contract.
- 6. Vendor affirms that failure to comply with the state law requirements can result in the City's termination of the contract and other penalties as provided by law.

VENDOR: Wharton-Smith, Inc.	(Vendor's Company Name)
Tom larossi Vice President	(Vendor signature) _(Vendor's name printed) _(Title)
Sworn to and subscribed before me by	means of X physical presence oronline notarization, this $3rd$ day
of November , 2022 , by Tom larossi	, asVice President
	Notary Public
Personally Known X OR Produced Identif	Commission # HH 048139 My Comm. Expires Jan 18, 2025 Bonded through National Notary Assn.
THIS PAGE MUST	BE COMPLETED AND SUBVITITED WHITPROPUSAL

END OF PART IV

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Client#: 706782

WHARTINC

ACORD... CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 3/31/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer any rights to the certificate holder in lieu of such endorsement(s)

tine continuate account contor any righte to the continuate holder in he	a or each endercoment(o).	
PRODUCER	CONTACT Certificate Department	
Marsh & McLennan Agency	PHONE (A/C, No, Ext): 727 447-6481 FAX (A/C, No):	
Bouchard Region	E-MAIL ADDRESS: certificates@bouchardinsurance.com	
1 N. Dale Mabry Hwy, Suite #450	INSURER(S) AFFORDING COVERAGE	NAIC #
Tampa, FL 33609	INSURER A : Amerisure Insurance Company	19488
INSURED	INSURER B: Amerisure Mutual Insurance Company	23396
Wharton-Smith, Inc.	INSURER C : Berkley Assurance Company	39462
750 Monroe Road	INSURER D : XL Specialty Insurance	37885
Sanford, FL 32771	INSURER E: Amerisure Partners Insurance Company	11050
	INSURER F:	

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS

	EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN WAT HAVE BEEN REDUCED BY PAID CLAWS.								
INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS		
Α	X COMMERCIAL GENERAL LIABILITY	Υ	Υ	GL20361081701	04/01/2022		EACH OCCURRENCE	\$1,000,000	
	CLAIMS-MADE X OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	\$1,000,000	
							MED EXP (Any one person)	\$10,000	
							PERSONAL & ADV INJURY	\$1,000,000	
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	\$2,000,000	
	POLICY X PRO- JECT X LOC						PRODUCTS - COMP/OP AGG	\$2,000,000	
	OTHER:							\$	
Е	AUTOMOBILE LIABILITY	Υ	Υ	CA20361071705	04/01/2022		COMBINED SINGLE LIMIT (Ea accident)	\$1,000,000	
	X ANY AUTO						BODILY INJURY (Per person)	\$	
	OWNED SCHEDULED AUTOS						BODILY INJURY (Per accident)	\$	
	X HIRED AUTOS ONLY X NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	\$	
								\$	
Α	X UMBRELLA LIAB X OCCUR	Υ	Υ	CU21171470101	04/01/2022	04/01/2023	EACH OCCURRENCE	\$5,000,000	
	EXCESS LIAB CLAIMS-MADE						AGGREGATE	\$5,000,000	
	DED X RETENTION \$0							\$	
В	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY		Υ	WC203610916	04/01/2022	04/01/2023	X PER STATUTE OTH-		
	ANY PROPRIETOR/PARTNER/EXECUTIVE	N/A					E.L. EACH ACCIDENT	\$1,000,000	
	(Mandatory in NH)						E.L. DISEASE - EA EMPLOYEE	\$1,000,000	
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - POLICY LIMIT	\$1,000,000	
D	Rented Equipment			UM00024961MA22A	04/01/2022	04/01/2023	2,500,000		
С	Pollution Liab	Υ		PCADB50178540422	04/01/2022	04/01/2023	5,000,000		
С	Professional Liab			PCADB50178540422	04/01/2022	04/01/2023	5,000,000		

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) Certificate holder is additional insured as respects General Liability, Automobile Liability, Pollution Liability and Umbrella only if required by written contract, and subject to the terms, conditions and exclusions as specified in the policies.

Coverage is primary as respects to General Liability & Automobile Liability and non-contributory as subject (See Attached Descriptions)

CERTIFICATE HOLDER	CANCELLATION
For Informational Purposes Only	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE
	Jak Ly



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Insurance Continued

BUILDER'S RISK COVERAGE

NAMED INSURED: Wharton-Smith, Inc.

COMPANY: XL Specialty Insurance Company

NAIC #37885 AM Best Rating: A (Excellent), XV (\$2 Billion or greater)

POLICY TERM: 4/1/2022 - 4/1/2023 POLICY NUMBER: UM00024960MA22A

COVERED PROPERTY AND PREMISES DESCRIPTION

New construction and remodeling of waste or water treatment plants; new construction and nonstructural renovations of commercial buildings at various premises within the state of Georgia, Florida, North Carolina, South Carolina, Virginia, Mississippi, Alabama, Louisiana, Texas and Tennessee

SUMMARY

COVERAGE	LIMIT OF INSURANCE
Covered Property at Premises Described Above – Consisting of Frame or Joisted Masonry Construction	\$2,500,000
Covered Property at Premises Described Above – Consisting of Non-Combustible, Masonry Non- Combustible, Semi Fire-Resistive and Fire-Resistive Construction (Including Water Treatment Plants Except on Islands)	\$100,000,000
Covered Property at Premises Described Above – On Islands (Water Treatment Plant Projects Only)	\$5,000,000
Soft Costs	\$1,000,000

DEDUCTIBLE OR WAITING PERIOD

COVERAGE	DEDUCTIBLE OR WAITING PERIOD			
All Coverages Unless Otherwise Specified Below	\$5,000 projects \$50,000,000 and under.			
7 th Governages offices Guier wice opeomica Below	\$25,000 on projects over \$50,000,000.			
	12.5%, Subject to \$500,000 minimum			
Named Storm – On Islands	on projects up to \$8M.			
Named Storm - On Islands	10.0%, Subject to \$500,000 minimum			
	on projects over \$8M.			
	2%, Subject to \$5,000 Minimum on			
Named Storm - Water Treatment Plant Projects	projects \$50,000,000 and under			
Only	2%, Subject to \$25,000 minimum of			
	projects over \$50,000,000.			
	5%, Subject to \$5,000 Minimum on			
Named Storm - Frame, Joisted Masonry or Non-	projects \$50,000,000 and unde			
Combustible Construction	5%, Subject to \$25,000 minimum or			
	projects over \$50,000,000.			





Insurance Continued

Named Storm – Masonry Non-Combustible, Semi Fire-Resistive or Fire-Resistive Construction	2%, Subject to \$5,000 Minimum on projects \$50,000,000 and under. 2%, Subject to \$25,000 minimum of projects over \$50,000,000.
Flood – Zones C or X (Unshaded)	\$25,000
Flood – Zone B or Shaded X	\$50,000
Flood – All Other Zones and Water Treatment Projects on Islands	\$500,000
Earthmovement and Volcanic Eruption "Pacific Northwest Seismic Area" "High Hazard Seismic Zones"	1% Subject to \$50,000 Minimum
Earthmovement and Volcanic Eruption "New Madrid Seismic Area"	1% Subject to \$50,000 Minimum
Earthmovement and Volcanic Eruption – All Other	\$25,000

SUBLIMITS

Coverage	LIMIT OF INSURANCE
Flood – Per Occurrence – Zone C or Unshaded X	\$75,000,000
Flood – Per Occurrence – Zones B & Shaded X	\$15,000,000
Flood – Per Occurrence – All Other Zones	\$1,000,000
Flood – Per Occurrence – Islands (Waste Water Treatment Plants Only)	\$500,000
Flood Annual Aggregate	\$75,000,000
Earth Movement and Volcanic Eruption – Pacific Northwest Seismic Area, High Hazard Seismic Zones	\$1,000,000
Earth Movement and Volcanic Eruption – New Madrid Seismic Area	\$10,000,000
Earth Movement and Volcanic Eruption – Per Occurrence	\$50,000,000
Earth Movement and Volcanic Eruption – Annual Aggregate	\$50,000,000
Windstorm or Hail – Premises Located on Islands	\$2,500,000





Insurance Continued

COVERAGE TERMS

- ◆ Maximum Limit of Insurance: \$100,000,000
- ◆ Valuation Clause: Replacement Cost
- ◆ Co-Insurance: 0%
- Additional Coverages Testing: Electrical, Mechanical, Pneumatic and Hydrostatic
- ◆ Equipment Breakdown Endorsement
- ◆ Loss of Use Coverage Endorsement
- ◆ Permission to Occupy Endorsement
- ◆ Additional Coverage Limit for Valuable Papers \$250,000

ADDITIONAL COVERAGE	LIMIT OF INSURANCE
Contract Penalty	\$250,000
Debris Removal	\$500,000 / 25%
Extra and Expediting Expenses	\$50,000
Fire Department Service Charge	\$25,000
Fire Protection Systems	\$25,000
Increase in Construction Costs	\$200,000 / 10%
Landscaping and Signs	\$100,000
Limited Coverage for "Fungi", Wet Rot and Dry Rot	\$25,000
Loss Adjustment Expenses	\$5,000
Demolition Cost and Increased Cost of Construction	\$500,000
Pollutant Cleanup and Removal	\$25,000
Preservation of Property	Covered
Property in the Open	\$25,000
Property that Supports your Business	\$50,000
Reimbursement for Returning Stolen Property	\$10,000
Reward Coverage	\$5,000
Site Preparation	Covered
Sewer and Drain Backup	Covered
Sinkhole Collapse	Covered
Temporary Premises	\$1,000,000
Temporary Structures	\$25,000
Transit	\$1,000,000
Unintentional Errors and Omissions	\$25,000
Virus, Harmful Code or Similar Instruction	\$10,000
Voluntary Parting	\$25,000





ATTACHMENT 16: **CERTIFICATION BY BIDDER**

Executive Order 11246 (contracts/subcontracts above \$10,000)

This certification is required pursuant to Executive Order 11246 (30 F.R. 12319-25). The implementing rules and regulations provide that any bidder or prospective contractor, or any of their proposed subcontractors, shall state as an initial part of the bid or negotiations of the contract whether it has participated in any previous contract or subcontract subject to the equal opportunity clause; and if so, whether it has filed all compliance reports due under applicable instructions.

Where the certification indicates that the bidder has not filed a compliance report due under applicable instructions, such bidder shall be required to submit a compliance report within seven calendar days after the ITB opening. No contract shall be awarded unless such report is submitted.

NAME AND ADDRESS OF BIDDER (include ZIP Code): \(\frac{N}{2}\)	harton-Smith, Inc.	
	525 Bobcat Village Center Rd., U	Jnit 105, North Port, FL 34288
Bidder has participated in a previous contract or sulpho []		
Compliance reports were required to be filed in cor	nection with such contra	ct or subcontract. Yes No [
3. bidder has filed all compliance reports due under ap	pplicable instructions.	Yes XNo []
4. Have you ever been or are you being considered fo as amended?	r sanction due to violatio	n of Executive Order 112246, Yes [] No X
Signed, sealed and delivered this 3rd	day of November	, 20 22.
By: om Caus		· ;=
Tom larossi		
(Printed Name) Vice President		
(Title)		
STATE OF Florida		
COUNTY OF Sarasota		
	aay o:	vember , 20 22 , by duced his/her driver's license
as identification.		
Venu Stipling	DESIREE STRICKLING	7
Notary Public - State of Florida	Notary Public - State of Florid Commission # HH 048139	a S
Print Name: Desiree Stricking Commission No: HH 048/39	My Comm. Expires Jan 18, 202	15
10.111.01.01	Bonded through National Notary Ass	n. (

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Addendum #5

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CERTIFICATION REGARDING DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS PRIMARY COVERED TRANSACTIONS

This contract is a covered transaction for purposes of 2 C.F.R. pt. 180 and 2 C.F.R. pt. 3000.

The Bidder certifies that, neither the firm nor any person associated therewith in the capacity of owner, partner, director, officer, principal, investigator, project director, manager, auditor, and/or position involving the administration of federal funds:

- (a) is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions, as defined in 49 CFR s29.110(a), by any federal department or agency;
- (b) has within a three-year period preceding this certification been convicted of or had a civil judgment rendered against it for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a federal, state, or local government transaction or public contract; violation of federal or state antitrust statutes; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
- (c) is presently indicted for or otherwise criminally or civilly charged by a federal, state, or local governmental entity with commission of any of the offenses enumerated in paragraph (b) of this certification; and
- (d) has within a three-year period preceding this certification had one or more federal, state, or local government public transactions terminated for cause or default.

The Bidder certifies that it shall not knowingly enter into any transaction with any subcontractor, material supplier, or vendor who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this project by any federal agency unless authorized by the City of North Port.

The Bidder must comply with 2 C.F.R. pt. 180, subpart C and 2 C.F.R. pt. 3000, subpart C and must include a requirement to comply with these regulations in any lower tier covered transaction it enters into.

This certification is a material representation of fact relied upon by the City of North Port. If it is later determined that the contractor did not comply with 2 C.F.R. pt. 180, subpart C and 2 C.F.R. pt. 3000, subpart C, in addition to remedies available to the City of North Port, the Federal Government may pursue available remedies, including but not limited to suspension and/or debarment.

The bidder or proposer agrees to comply with the requirements of 2 C.F.R. pt. 180, subpart C and 2 C.F.R. pt. 3000, subpart C while this offer is valid and throughout the period of any contract that may arise from this offer.

The bidder or proposer further agrees to include a provision requiring such compliance in its lower tier covered

transactions. 59-2392802 11-5152639 Wharton-Smith, Inc. Company (Bidder) Name Tax ID Number **DUNS Number** Tom Iarossi, Vice President Authorized Representative Name Authorized Representative Signature

59-2392802 11-5152639 0P3Y5

Federal Issued Tax **DUNS Number** CAGE Code issued through www.sam.gov **Identification Number**

DATE: 11/3/2022 (If Social Security number DO NOT enter)

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CERTIFICATIONS AND REPRESENTATIONS

(GRANTFUNDS)

1. BYRD ANTI-LOBBYING AMENDMENT COMPLIANCE AND CERTIFICATION For all orders above the limit prescribed in 2 CFR 215, Appendix A, Section 7 (currently \$100,000), the Offeror must complete and sign the following:

The following certification and disclosure regarding payments to influence certain federal transactions are made per the provisions contained in OMB Circular A-110 and 31 U.S.C. 1352, the "Byrd Anti-Lobbying Amendment."

The offeror, by signing its offer, hereby certifies to the best of his or her knowledge and belief that:

No Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress on his or her behalf in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment or modification of any Federal contract, grant, loan, or cooperative agreement;

If any funds other than Federal appropriated funds (including profit or fee received under a covered Federal transaction) have been paid, or will be paid, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress on his or her behalf in connection with this solicitation, the offeror shall complete and submit, with its offer, OMB standard form LLL, Disclosure of Lobbying Activities, to the Contracting Officer; and

He or she will include the language of this certification in all subcontract awards at any tier and require that all recipients of subcontract awards in excess of \$100,000 shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance is placed when this transaction was made or entered into. Submission of this certification and disclosure is a prerequisite for making or entering into this contract imposed by section 1352, title 31, United States Code. Any person making an expenditure prohibited under this provision or who fails to file or amend the disclosure form to be filed or amended by this provision, shall be subject to a civil penalty of not less than \$10,000, and not more than \$100,000, for each such failure.

SIGNATURE:	om and	
COMPANY NAME:	Wharton-Smith, Inc.	
DATE: 11/3/2022		_

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ACKNOWLEDGEMENT OF TERMS, CONDITIONS, AND GRANT CLAUSES

Flow down of Terms and Conditions from the Federal Regulations and/or Grant Agreement

Subcontracts: If the Bidder subcontracts any portion of the work under this Agreement, a copy of the signed subcontract must be available to the City of North Port for review and approval. The bidder agrees to include in the subcontract that:

- (1) the subcontractor is bound by the terms of this Agreement;
- (2) the subcontractor is bound by all applicable state and federal laws and regulations; and
- (3) the subcontractor shall hold the City of North Port, grant recipient and granting agency harmless against all claims of whatever nature arising out of the subcontractor's performance of work under this Agreement, to the extent allowed and required by law.

Grant Conditions and Federal Provisions

On behalf of the Bidder, I acknowledge, and agree to perform all of the specifications and grant requirements identified in this solicitation document(s).

SIGNATURE: _____

COMPANY NAME: Wharton-Smith, Inc.

DATE: 11/3/2022

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FEDERAL NON-COLLUSION /LOBBYING CERTIFICATION

	Tom larossi	, being the	authorized	Agent.	certifies	that
He/she is the	Officer					wner
Partner, Officer	, Representative or Agent) of _	Wharton-Smith, Inc.		, the E	Bidder th	at has
submitted the a	ttached Proposal.					

NON-COLLUSION PROVISION CERTIFICATION

The undersigned hereby certifies, to the best of his or her knowledge and belief, that on behalf of the person, firm, association, or corporation submitting the bid certifying that such person, firm, association, or corporation has not, either directly or indirectly, entered into any agreement, participated in any collusion, or otherwise taken any action, in restraint of free competitive bidding in connection with the submitted bid. Failure to submit the executed statement as part of the bidding documents will make the bid nonresponsive and not eligible for award consideration.

LOBBYING CERTIFICATION

"The undersigned hereby certifies, to the best of his or her knowledge and belief, that:

- (a) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence either directly or indirectly an officer or employee of any state or federal agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal Contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
- (b) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with this Federal contract, grant loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-L "Disclosure Form to Report Lobbying", in accordance with its instructions.
- (c) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into.

Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, US Code. Any persons who fail to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each failure."

in Stipl

Tom larossi (Printed Name) Vice President

(Title)

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Addendum #5

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